

BEFORE THE COUNCIL OF THE
METROPOLITAN SERVICE DISTRICT

AN ORDINANCE AMENDING ORDINANCE NO.)
90-340A REVISING THE FY 1990-91)
BUDGET AND APPROPRIATIONS SCHEDULE)
FOR ADDING ONE FULL TIME ASSOCIATE)
MANAGEMENT ANALYST (.75 FTE) IN THE)
PERSONNEL DIVISION)

ORDINANCE NO. 90-360

Introduced by Rena Cusma,
Executive Officer

WHEREAS, The Council of the Metropolitan Service District has reviewed and considered the need to modify the FY 1990-91 Budget; and

WHEREAS, The need for a modified budget plan has been justified; and

WHEREAS, Adequate funds exist for other identified needs; now, therefore,

THE COUNCIL OF THE METROPOLITAN SERVICE DISTRICT HEREBY ORDAINS:

That Ordinance No. 90-340A, Exhibit B, FY 1990-91 Budget, and Exhibit C, Schedule of Appropriations, are hereby amended as shown in Exhibits A and B to this Ordinance for the purposes of adding one FTE Associate Management Analyst in the Personnel Division. The budget note shown in Exhibit C to this Ordinance is hereby adopted and included in the Budget Notes for FY 1990-91.

ADOPTED by the Council of the Metropolitan Service District this

27th day of September, 1990.



Tanya Collier, Presiding Officer

ATTEST:



Gwen Ware-Barrett
Clerk of the Council

kr:ord90-91:pers:ord
09/27/90

EXHIBIT A
ORDINANCE NO. 90-360

FISCAL YEAR 1990-91		CURRENT BUDGET		REVISION		PROPOSED BUDGET	
ACCOUNT #	DESCRIPTION	PTE	AMOUNT	PTE	AMOUNT	PTE	AMOUNT
SUPPORT SERVICES FUND: Personnel							
Personal Services							

511121	SALARIES-REGULAR EMPLOYEES (full time)						
	Personnel Manager	1.00	51,197		(4,000)	1.00	47,197
	Assistant Personnel Manager	1.00	40,413			1.00	40,413
	Sr. Management Analyst	1.00	40,413		(5,334)	1.00	35,079
	Assoc. Management Analyst	2.00	71,525	1.00	17,647	3.00	89,172
511221	WAGES-REGULAR EMPLOYEES (full time)						
	Administrative Secretary	1.00	21,271			1.00	21,271
	Personnel Clerk	1.00	17,962			1.00	17,962
	Accounting Clerk 1	0.50	8,981			0.50	8,981
511235	WAGES-TEMPORARY EMPLOYEES (part time)						
	Temporary Administrative Support	0.25	4,374			0.25	4,374
512000	FRINGE		79,402		3,576		82,978
			-----		-----		-----
	Total Personal Services	7.75	335,538	1.00	11,889	8.75	347,427
Materials & Services							

521100	Office Supplies		1,000		2,895		3,895
521310	Subscriptions		600				600
521320	Dues		750				750
524210	Data Processing Services		7,500				7,500
526200	Ads & Legal Notices		10,000				10,000
526500	Travel		675				675
526700	Temporary Help Services		4,825				4,825
526800	Training, Tuition, Conferences		2,200		500		2,700
529500	Meetings		500				500
			-----		-----		-----
	Total Materials & Services		28,050		3,395		31,445
Capital Outlay							

571500	Purchases-Office Furniture & Equipment		5,436		2,600		8,036
			-----		-----		-----
	Total Capital Outlay		5,436		2,600		8,036
			-----		-----		-----
	TOTAL EXPENDITURES	7.75	369,024	1.00	17,884	8.75	386,908

EXHIBIT A
ORDINANCE NO. 90-360

FISCAL YEAR 1990-91		CURRENT BUDGET		REVISION		PROPOSED BUDGET	
ACCOUNT #	DESCRIPTION	PTE	AMOUNT	PTE	AMOUNT	PTE	AMOUNT
SUPPORT SERVICES FUND: General Expenses							
Interfund Transfers							
581513	Trans. Indirect Costs to Bldg. Fund		249,137				249,137
581615	Trans. Indirect Costs to Insurance Fund		26,762				26,762
	Total Interfund Transfers		275,899		0		275,899
Contingency and Unappropriated Balance							
599999	Contingency		150,000		(17,884)		132,116
	Unappropriated Fund Balance		30,000				30,000
	Total Contingency and Unappropriated Balance		180,000		(17,884)		162,116
	TOTAL EXPENDITURES	61.70	4,377,122	1.00	0	62.70	4,377,122

EXHIBIT B
 ORDINANCE NO. 90-360
 SCHEDULE OF APPROPRIATIONS FY 1990-91

	CURRENT APPROPRIATION	REVISION	PROPOSED APPROPRIATION
SUPPORT SERVICES FUND			

Finance & Administration			
Personal Services	1,569,883		1,569,883
Materials & Services	940,004		940,004
Capital Outlay	59,511		59,511
	-----	-----	-----
Subtotal	2,569,398	0	2,569,398
Personnel			
Personal Services	335,538	11,889	347,427
Materials & Services	28,050	3,395	31,445
Capital Outlay	5,436	2,600	8,036
	-----	-----	-----
Subtotal	369,024	17,884	386,908
Office of General Counsel			
Personal Services	296,913		296,913
Materials & Services	18,120		18,120
Capital Outlay	8,500		8,500
	-----	-----	-----
Subtotal	323,533	0	323,533
Public Affairs			
Personal Services	547,839		547,839
Materials & Services	98,661		98,661
Capital Outlay	12,768		12,768
	-----	-----	-----
Subtotal	659,268	0	659,268
General Expense			
Contingency	150,000	(17,884)	132,116
Interfund Transfers	275,899		275,899
	-----	-----	-----
Subtotal	425,899	(17,884)	408,015
Unappropriated Balance	30,000		30,000
Total Support Services Fund Requirements	4,377,122	0	4,377,122

STAFF REPORT

CONSIDERATION OF ORDINANCE NO. 90-360 AMENDING ORDINANCE NO.
90-340A REVISING THE FY 1990-91 BUDGET AND APPROPRIATIONS
SCHEDULE ADDING ONE FULL TIME ASSOCIATE MANAGEMENT ANALYST IN
THE PERSONNEL DIVISION

Date: July 26, 1990

Presented by: Karen Delaney

FACTUAL BACKGROUND AND ANALYSIS

Prior to July 1, 1990, and the assumption of the Metro ERC facilities, workers compensation under the State Accident Insurance Fund was covered under a "retro premium" policy. Based on retrospective history, \$345,000 was budgeted for FY 1990-91 to cover workers compensation premiums. This amount was determined based on Metro's history only, and, due to the lack of any available documentation and the timeframe during which the budget was prepared and adopted, the impact of Metro ERC was not able to be determined. On July 1, 1990 Metro entered into a FY 1990-91 contract with SAIF based on the history of both entities, and changed the coverage from a "retro premium" to an "incurred loss" program based on the advice and counsel of the agency's broker of record. The potential premium liability for this coverage is \$742,000 for the Fiscal Year. In addition to a dramatic increase in Metro's potential fiscal liability, the July 1st assumption of the Metro ERC facilities significantly increased the sheer scope of the workers compensation activities in the agency.

Based on the history as outlined above, and on the clearly apparent needs to manage, as opposed to simply administer, the workers compensation/safety program for the agency, it is critical that sufficient staff support be made available. Such support does not currently exist within the authorized Personnel Division staff. The primary focus of the requested position will be to manage the agency's workers compensation program including all associated tasks for Metro Center, the Metro Washington Park Zoo, and Metro ERC facilities. In addition to monitoring all claims and assisting in claims investigation, with the anticipated result of reducing claims costs to the agency and ensuring that the agency's potential premium liability is not realized, a major goal of the position will be to develop safety programs to reduce claims and develop and administer cost containment measures to address future liability. Tasks will include, but not be limited to, reviewing and providing input into all site evaluations conducted by SAIF, establishing procedures for routing and efficient handling of claims reports, monitoring the progress of all claims to reduce reserves, reviewing work sites for possible light duty positions and ensuring that injured workers are returned to such positions as rapidly as possible, and establishing other cost control measures to insure that costs to the agency are maintained at the lowest possible level. Since Metro is now participating in an incurred loss program, such activities can result in significant savings to the agency.

BUDGET IMPACT

This Ordinance amends the Fiscal Year 1990-91 Budget, to transfer funds from Contingency to the Executive Management Department, Personnel Division for the purpose of funding one full time Associate Management Analyst beginning October 1, 1990 (.75 FTE) to manage the Workers Compensation Program for the agency. The position request is attached to this report. Requested funds in the amount of \$17,884 to be transferred from contingency, in addition to funds currently available in the Personnel Division budget in the amount of \$17,334, will support both the Personal Services component of the program, and the additional Materials and Services and Capital Outlay needs. The total request is itemized below.

Personnel Services	
New .75 FTE Associate Management Analyst	\$21,647
Associated fringe	7,576
Savings in current budgeted position:	
- Personnel Manager	(4,000)
- Senior Management Analyst	(5,334)
- Associate Management Analyst	(4,000)
- Fringe	(4,000)
Materials & Services	
General Office Supplies	\$ 100
Telephone	90
Training and seminars	500
Office Furniture	2,705
Capital Outlay	
Personnel Computer	<u>\$ 2,600</u>
TOTAL REQUEST FROM CONTINGENCY	\$17,884

EXECUTIVE OFFICER'S RECOMMENDATION

Creation of the requested position will accomplish the agency goal of reducing workers compensation costs, enhancing agency-wide safety, and insuring that the agency is in full compliance with all applicable workers compensation laws and guidelines. The Executive Officer recommends adoption of Ordinance No. 90-360 adding one full-time Associate Management Analyst beginning October 1, 1990 (.75 FTE) in the Personnel Division.



New Position/Reclass/ FTE Increase Request

Fiscal Year 1990-91

ACTION REQUESTED

Create .75 FTE position of Associate Management Analyst in the Executive Management Department, Personnel Division, budget.

INCUMBENT

Duties are currently being performed by a temporary employee - position, if authorized, will be filled through a formal recruitment/selection process per Code.

DUTIES AND RESPONSIBILITIES

The primary focus of this position will be to manage the agency's Workers Compensation program, including all associated tasks, for Metro Center, Metro Washington Park Zoo, and Metro ERC facilities. Duties will include, but not be limited to, monitoring all claims and assisting in claims investigation, reviewing all site evaluations performed by SAIF staff and providing input to the evaluations, establishing procedures for routing of claims reports, reviewing and implementing return to work and light duty positions, reviewing and revising reporting and claims payment procedures, and establishing cost control measures to ensure costs to the agency are maintained at the lowest possible level. In addition, this position is to be responsible for developing and implementing an agency-wide safety program and return to work program for employees injured on or off the job. The employee filling this position will be the agency liaison with the collective bargaining agreement mandated Safety Committees and will assist in the implementation of adopted safety recommendations.

This position may be assigned additional personnel generalist duties in support of the agency's personnel function as necessary.

QUALIFICATIONS

Knowledge of: principles, practices and legislation applicable to workers compensation; principles and practices of public personnel administration.

Skill in: reading, interpreting and enforcing laws, rules and regulations; analyzing issues and making recommendations for solution; developing and implementing programs to address an identified need; effective oral and written communications.

Ability to: establish and maintain effective working relationships with Metro and MERC staff, representatives of other governmental units (ie. SAIF) and the insurance industry; work independently and as part of a team.

Bachelor's degree in personnel, public administration or a related field and a minimum of two years experience in personnel. Experience in coordinating a workers compensation program preferred.

JUSTIFICATION

On July 1, 1990 with the assumption of the MERC staff into Metro's workers compensation system, and with changes within the State Accident Insurance Fund resulting in significantly increased premium rates, the agency has assumed a potential premium liability of \$742,000 for workers compensation insurance. Based on retrospective premium rate review (and having no documentation regarding MERC history), \$345,000 was budgeted for workers compensation during Fiscal Year 1990-91. This dramatically increased liability, as well as the need to manage the total area of work related injury/illness claims and develop long range cost containment strategies for the agency, underscores the need for a professional staff member to serve as the workers compensation program manager. As Metro is currently under an "incurred loss" program, rather than the previous "retro premium" program, the activities of the staff member assigned to this area can result in significant savings to the agency, not only from the standpoint of claims management and cost containment, but also in the area of long range planning and safety training. In summary, this position is needed to ensure cost effective claims management and safety services, to limit the agency's potential premium liability insofar as possible, and to enhance the safety of the workplace for all employees.

BUDGET IMPACT

Salary:	\$21,647.
Fringe:	7,576.
Total Personal Services:	\$29,223.
Materials and Services:	3,395.
Capital Outlay:	2,600.
TOTAL REQUEST:	\$35,218.

A:FTEREQ



METRO

2000 S.W. First Avenue
Portland, OR 97201-5398
503/221-1646

Memorandum

DATE: August 28, 1990

TO: COUNCIL FINANCE COMMITTEE

FROM: Karen Delaney, Personnel Manager *Karen Delaney*

SUBJECT: Requested Analytical Data for Proposed
Workers' Compensation Specialist Position

As requested during the Finance Committee Meeting on August 16, please find attached a detailed analysis of the proposed Workers' Compensation Specialist Position.

I have included for your easy reference a Table of Contents which outlines the information included herein.

Additionally, I have included a number of graphs and Exhibits which support this proposal.

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PAGE 2, 3	Detailed Job Description for Workers' Compensation Specialist
PAGE 4	Projects Started since June 1990
PAGE 5	Proactive Human Resources Activities
PAGE 6	Training Analysis for Return to Work and Safety Programs
EXHIBIT 1	Human Resources Functional Analysis
EXHIBIT 2	SAIF Customers Analysis of Employers who Have Instituted a Return to Work Program
EXHIBIT 3	Metro Retro SAIF Premium Graph
EXHIBIT 4	Graph of Total Costs Incurred for Metro/Erc
EXHIBIT 5	Graph of Metro Claims Comparison
EXHIBIT 6	Graph of ERC Claims Comparison
EXHIBIT 7	Graph of METRO Total Time Loss Days

ANALYSIS OF JOB FUNCTIONS FOR WORKERS' COMPENSATION SPECIALIST.

The following breakdown is an analysis of the proposed Worker's Compensation Position in which 65% of the time is spent on issues directly related to worker's compensation; 10% on safety issues; and 25% on recruiting and employment issues and special projects as assigned.

Below is a percentage break down of time used for each job function.

65% Managing the agency's Workers' Compensation Program

- 30% Monitoring all claims.
- 4% Assisting/handling claims investigations.
- 3% Reviewing all site evaluations performed by SAIF.
 - providing input to the evaluations
 - implementing the recommendations
- 3% Establishing procedures for monitoring/routing claims reports.
- 10% Reviewing and implementing return to work and light duty positions.
- 5% Establishing cost control measures to ensure costs to the agency are maintained at the lowest possible level.
- 10% Developing and implementing an agency-wide return to work program for employees injured on the job.

10% Managing the Agency's Safety Program

- 4% Developing and implementing an agency-wide safety program.
- 3% Acting agency liaison with the collective bargaining agreement mandated Safety Committees.
- 2% Assisting with the implementation of adopted safety recommendations.
- 1% Evaluating external safety training resources.

25% Recruiting and Employment functions; special projects as assigned.

- 20% Additional personnel generalist duties to include recruiting and employment functions (see Recruitment and Selection Activities, Page 3, part 4)
- 5% Special projects as assigned (see list of Projects on Page 4 & Exhibit 1)

DETAILED JOB DESCRIPTION FOR
WORKERS' COMPENSATION SPECIALIST

1. Manage the agency's Workers' Compensation Program
 - a. Monitoring all claims including:
 - answering questions for SAIF on claims and 801's;
 - verifying all new claims with the information sent from SAIF;
 - monitoring time loss and medical payments;
 - answering manager/supervisor questions regarding procedures for claims and injured employees;
 - maintaining a constant flow of communication with injured employees.
 - b. Assisting in claims investigation.
 - Conducting site investigations for serious claims;
 - Interviewing injured employee and witnesses;
 - Evaluation and recommendation to SAIF on claim validity.
 - Reviewing all site evaluations performed by SAIF.
 - Providing input to the evaluations, and implementing recommendations resulting from the evaluations.
 - Disclosing any safety issues with the facilities Safety Committee.
 - d. Establishing procedures for routing of claims reports.
 - e. Reviewing and implementing return to work and light duty positions.
 - With the assistance of the physician and the supervisor, identify light duty assignments for the injured worker.
 - f. Reviewing and revising reporting/claims payment procedures.
 - g. Establishing cost control measures to ensure costs to the agency are maintained at the lowest possible level.
 - h. Developing and implementing an agency-wide return to work program for employees injured on the job.
 - Includes writing the program for each facility and training all levels of management to assist in administering the program.

2. Manage the agency's Safety Program.
 - a. Developing and implementing an agency-wide safety program.
 - Writing the program for each job site and training all levels of management.
 - b. Acting as Agency liaison with the collective bargaining agreement mandated Safety Committees.
 - c. Assist in the implementation of adopted safety recommendations.
 - d. Evaluate external training resources on safety.
3. Develop and implement an agency-wide return to work program for employees injured in non-industrial accidents.
 - Using the return to work program for industrial accidents, implement a similar process for identifying temporary positions for employees injured in non-industrial accidents.
4. Additional personnel generalist duties including Recruiting and Employment functions:
 - a. Monitoring vacancies and new positions to ensure timely recruitment;
 - b. Determining appropriate recruitment and selection tools;
 - c. Designing/assisting in the design of selection tools (including job announcementsw, supplemental questions, application rating sheets, orgal questions and ratings).
 - d. Determining appropriate recruitment sources, writing and placing ads;
 - e. Ensuring mailing of announcements to AA list;
 - f. Participating in job fairs and other outreach efforts;
 - g. Monitoring the selection and hiring process conducted by agency managers to ensure that all selection activities are conducted in compliance with applicable Federal and State laws and METRO policies and procedures;
 - h. Pre-screening applications as requested, serving as application/interview rater as requested;
 - i. Overseeing the "closing" and maintenance of selection files.

PROJECTS STARTED SINCE JUNE 1990.

Workers' compensation projects in process:

- Early Return to Work Program for the Zoo
- Safety Program for the Zoo
- Analysis of Payroll figures reported to SAIF for the last five fiscal years (completed for Kathy Rutkowski)

Additional projects completed by temporary personnel:

- Preparation and completion of UMTA Report
- Evaluation and preliminary development of a new employee orientation.
- Evaluation of the New Thought Network organization
- Review and implementation of non-discriminatory language and proper job evaluation for MERC job postings--conducted training of MERC personnel
- Review and consideration of AVERT -- a Workers' Compensation inquiry service
- Review and consideration of implementation of a Pre-Employment Questionnaire
- Establishing outreach efforts by establishing communication with agencies and groups serving minorities and handicapped individuals.
- Americans with Disabilities Act - prepared and disseminated information by memo to dept. mgrs. on effects of new federal legislation.
- Coordinate unemployment program for METRO/MERC
- Assisted with preparation of summary sheet of benefits for represented employees.

PROACTIVE HUMAN RESOURCES ACTIVITIES
FY 1990-91

During Fiscal Year 1990-91 it is the intent of the Personnel Department to engage in a number of proactive human resources activities designed to address needs identified by the Executive Officer, Department Managers, Personnel Manager, personnel staff and Metro employees. Among these activities are:

Updating of the Metro Code for submission to Metro Council in the Fall 1990

Design and distribution of a Personnel Procedures Handbook and Employee Manual

Design, submission and distribution of a revised Affirmative Action Plan to encourage proactive agency wide Affirmative Action efforts and to more fully comply with EEOC and other Federal and State laws

Full scale classification/pay study of all Zoo classifications, including adoption of revised specifications for all classes represented by LIU Local 483 and modifications to specifications for non-represented classifications and classifications represented by AFSCME

Classification study of division level management positions in the Solid Waste Department

Analysis and possible revision of recruitment and application documents and advertising strategy

Coordination of personnel practices between Metro and MERC

The Executive Officer and Personnel Manager recognize that in order for the Personnel Department to be fully responsive to the needs of the agency as a whole, these activities are critical. Metro Council will continue to be kept apprised of these projects during all phases and will be requested to act formally on each of them as appropriate.

TRAINING ANALYSIS FOR RETURN TO WORK AND SAFETY PROGRAMS

Programs will be developed for each facility. The Zoo will be the first to be developed and implement the program.

RETURN TO WORK POLICY/PROGRAM

Information will be disseminated to the Department Managers, the supervisors, and the lead workers. :

Training will consist of the following:

1. An overall explanation of the workers' compensation system.
2. What an early return to work program means.
3. Definition of light-duty and alternative-duty, and how managers and supervisors should develop these jobs.
4. Benefits to having a return to work program (worker employer)
5. Explain the Return to Work Policy/Program
6. Explain the role of the employee, the manager, and Personnel.
7. Provide a list of resource names to include Zoo Security, Personnel and SAIF.
8. Provide an outline of the claims process.

SAFETY POLICY/PROGRAM

The policy/program should include components of the workers' compensation reforms and OR OSHA. Each work site will develop a Safety Committee. The committee will define their rights and responsibilities, and each member will attend training before becoming a member. One of the committees responsibilities will be to approve the Safety Policy/Program.

Training will consist of the following:

1. Define Safety.
2. Detailed explanation of the Safety Policy/Program.
3. Define Safety Committees and their responsibilities.
4. Explain employees, managers, and Metro's responsibilities.
5. Show how the Safety and Return to Work Programs interrelate.

FUNCTIONS	KIM	SARAH	W/C SPEC	MIKE	LISA	50% KAREN II	MERC NANCY	MERC P CLERK	Under Direction of Metro Personnel
									Manager Facilitates/Coordinates & Provides Staff Support
LABOR RELATIONS (ERC/MERC)				X					Labor Relations Staff Support as directed
Grievances				X					Research/data gathering on grievances.
Contracts Administration				X					Grievance Forms - tracking
Training & Dev. (Program)				X					Maintain communication
Negotiation				X					
Contract Interpretation				X					
Contract Compliance				X					
Administration				X					
MERC Coordination							X		
BENEFITS		X							Program Assistance/Facilitating/Coordinating
Health & Welfare		X							Forms - Distribution & Collection
Retirement - 401K		X							Processing, Review
NEO Program (Develop)		X	X						Information Distribution
Administration		X							Assistance communication/coordination
Education/Development		X							
Program Assistance Forms							X	X	
PAYROLL					X	X			Prepare PA's
Data Input						X			Prepare & forward all required supporting documentation
Overview					X	X		X	Coordinate payroll issues w/employee and/or department
PA's					X	X			
Accounting Liaison					X	X			
MERC Coordinator							X		
COMPENSATION	X								Provide staff support/supporting data for compensation issues
Non-Rep	X								Coordinate MERC Class/Comp Study
Rep				X					
Salary Surveys					X				
MERC Coordinator							X		
CLASSIFICATIONS	X								Provide supporting information
Non-Rep	X								
Rep				X					
Zoo Class Study									
MERC Coordinator							X		
RECRUITING & EMPLOYMENT									Posted METRO's MERC
Job Announcements			X				X		Final approval Agency H/R
Advertising			X				X		Final approval Agency H/R
Other Selection Tools			X				X		
Agency Coordination			X				X		
Maint. Exam Records/Files			X						Completed recruitment file sent to Agency H/R
Implementation of Selection Process					X		X		
Notification to Applicants						X		X	
NEO Program - Agency Wide		X	X						
Sign Ins					X			X	

FUNCTIONS	KIM	SARAH	W/C SPEC	MIKE	LISA	501 KAREN II	MERC NANCY	MERC P CLERK	
WORKERS COMPENSATION			X						
Claims Review			X				X		Staff support
Ret to Work Program			X				X		Coordinate/facilitate
Claims Mgmt w/SAIF & Coroon & Black			X						
Coordination of Information Reports - Prep & Document			X						
Training & Development			X						
PERSONNEL OFFICE ADMINISTRATION									
Personnel File Maintenance					X				
P.O.'s Capital Outlay					X		X		MERC only
Office Expenses					X		X		MERC only
EEO/AA	X						X		Prepares statistical data & supporting documentation for prep. annual report(s)
Programs/Annual Plan	X						X		
Prepares EEO/UMPTA Reports	X								
Compliance Officer	X						X		
Investigates Civil Rights Complaints	X						X		
U/E COMPENSATION									
METRO			X						
MERC							X		Transfer to consultant - Gibbons
EMPLOYEE RELATIONS									
EAP									Metro Personnel Mgr
Counseling/Discipline									Metro Personnel Mgr as directed
TRAINING & DEVELOPMENT									Diraction Metro Personnel Mgr Program/committee to be established

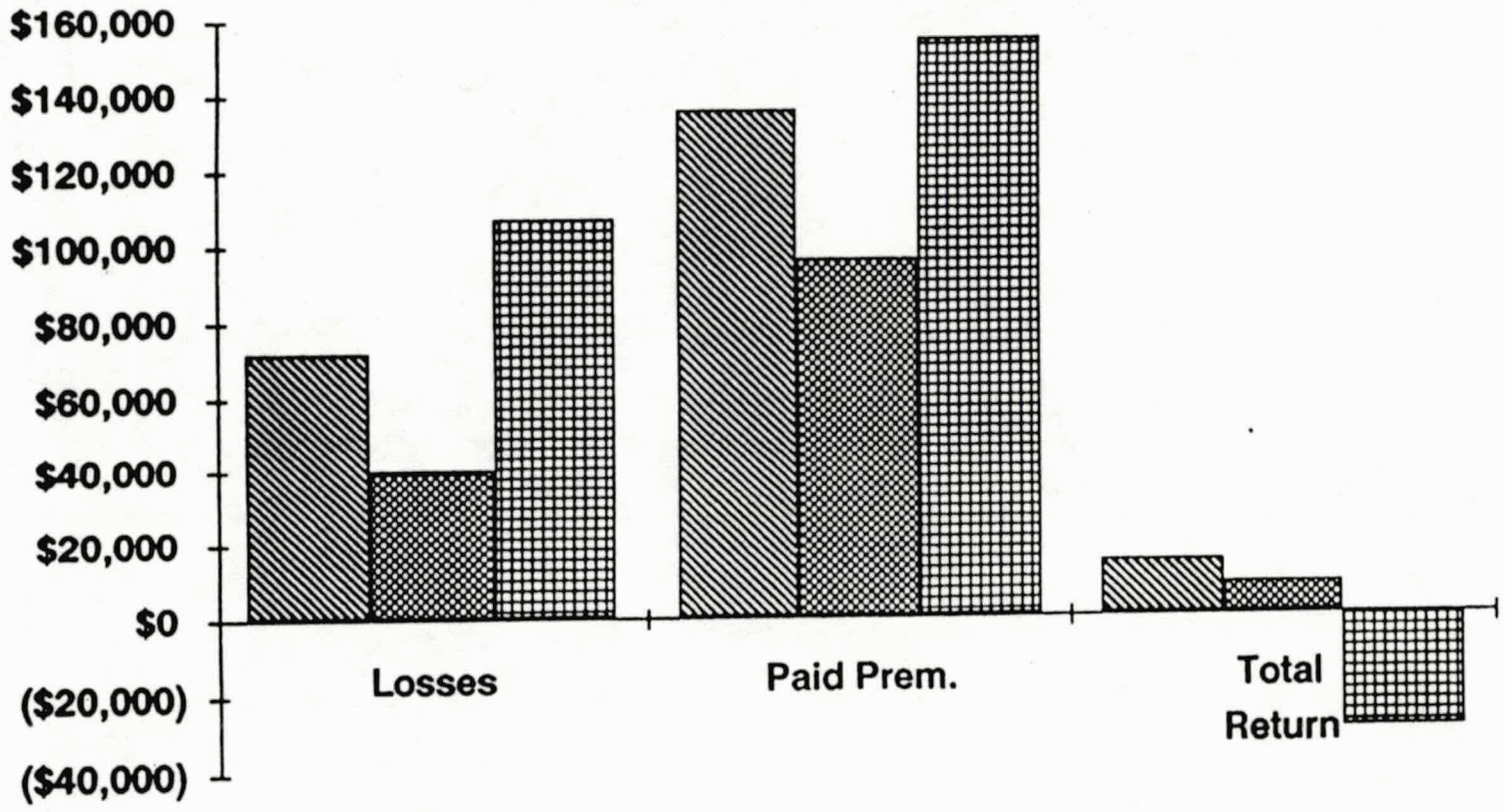
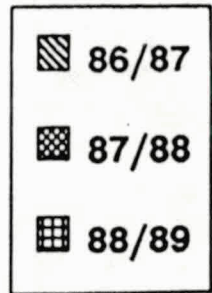
SAIF Customer Analysis of Employers who Have Instituted a Return to Work Program

Account Name	4/1-/88 to 3/31/89			4/1/89 to 3/31/90			Premium (Std)	Claims % Increase or Decrease	Days Lost Increase or Decrease	Incurred \$ Increase or Decrease
	Account #	# of Claims	Time Loss Days	Incurred Costs	# of Claims	Time Loss Days				
*	130	717	\$ 136,052	126	329	\$139,338	\$559,605	-3.31%	-388	+\$ 3,286
*	14	0	4,292	17	0	21,694	125,137	+17.7%	-0-	+17,402
*	91	587.5	138,907	42	64	76,979	154,297	-53.9%	-523.5	-61,928
	24	30	17,033	32	51	29,203	270,101	+33.3%	+21	+12,170
*	35	112	16,542	17	6.5	4,317	83,509	-105.8%	-105.5	-12,225
	294	1,446.5	312,826	234	450.5	271,531	1,192,649	-20.5%	-996	-41,295
	14	35.5	9,993	14	58	36,408	154,084	-0-	+22.5	+26,415
*	104	1,239	250,585	96	137.5	70,688	414,497	-7.7%	-1,101.5	-179,897
	41	201.5	29,899	33	99	21,960	102,736	-19.6%	-102.5	-7,939
*	24	581	94,534	22	137.5	29,091	174,460	-8.4%	-443.5	-65,443
*	5	84	27,115	8	0	608	129,693	+37.5%	-84	-26,507
*	27	215	44,100	22	57.5	16,250	287,525	-18.5%	-157.5	-27,850
*	16	236	70,357	22	54	28,310	112,705	+27.3%	-182	-42,047
*	36	645	96,280	15	21	28,528	257,250	-58.4%	-630	-67,752
*	15	309.5	38,311	24	45	7,624	152,101	+37.5%	264.5	-30,687
*	14	314	44,003	9	28.5	2,639	84,518	-25.8%	-285.5	-41,364
	590	5,307	1,018,003	499	1,088.5	513,637	3,062,218	-15.5%	-4,218.5	-504,366
			33.2% Incurred Loss Ratio				16.8% Incurred Loss Ratio		or 79.5%	or 49.6%

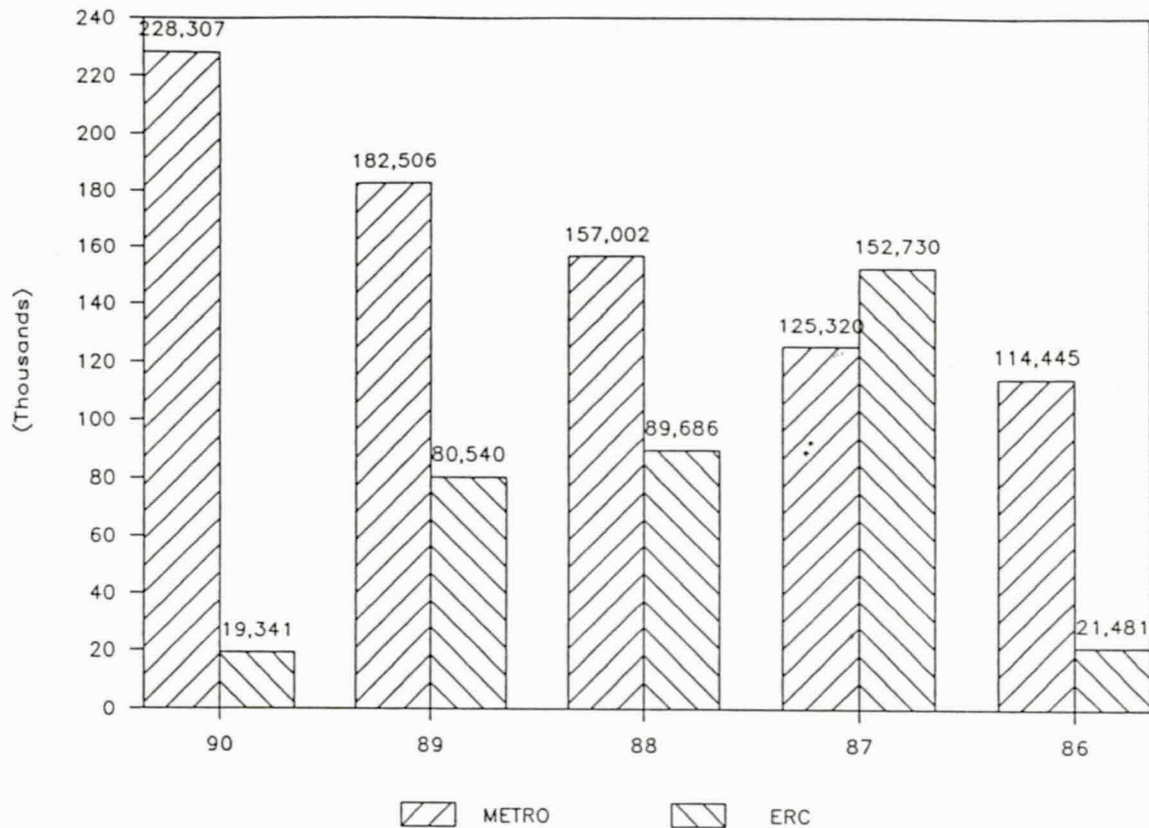
* Companies have an Early Return to Work program and Specific Coordinator in place

Metro Retro

	Losses	Paid Prem.	Return	Retro Prem.
86/87	\$71,589	\$135,338	\$14,582	\$122,021
87/88	\$39,673	\$95,551	\$8,382	\$87,662
88/89	\$106,957	\$155,131	(\$30,505)	\$185,473
TOTALS	\$218,219	\$386,020	(\$7,541)	\$395,156



TOTAL COSTS



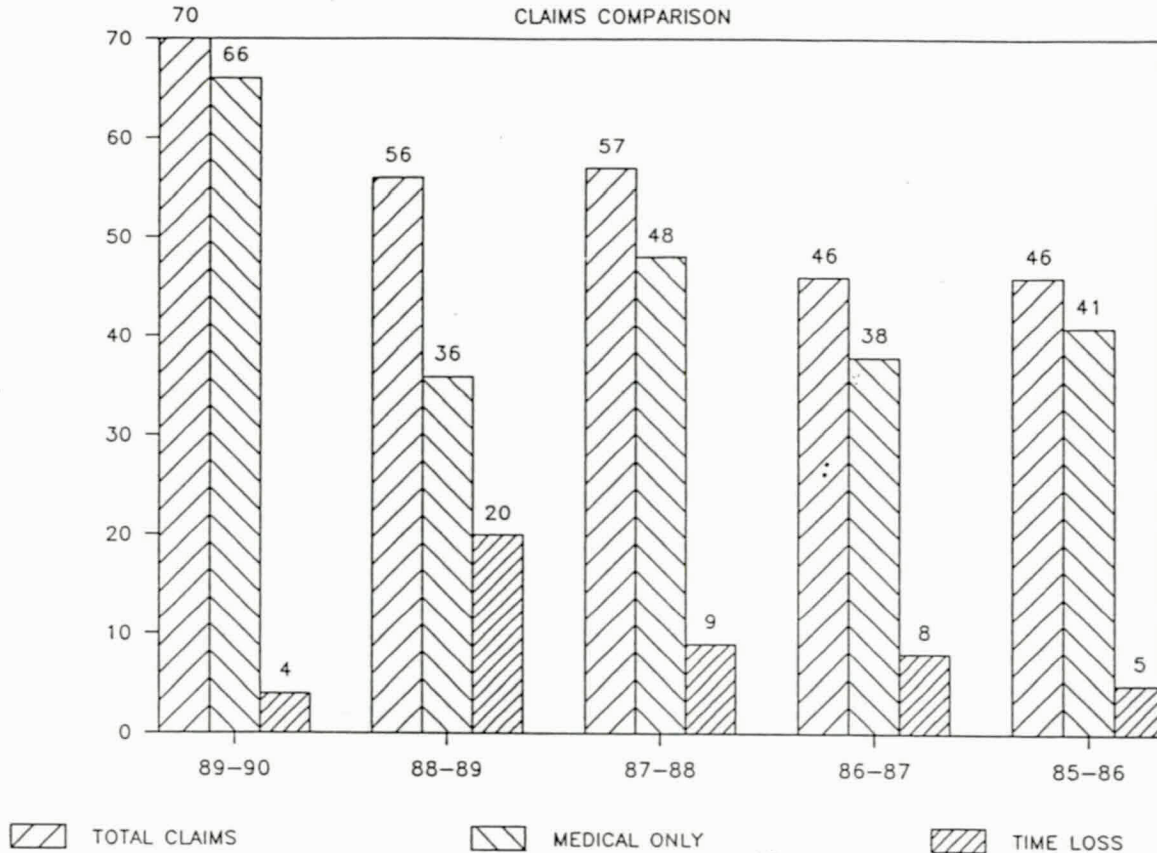
TOTAL COSTS INCURRED FOR METRO AND ERC

This graph reveals the following points:

1. From 1986-1990 costs have risen dramatically for METRO. (See Metro Retro Graph)
2. Conversely, costs during 1986-1990 have declined significantly at ERC. THIS IS A DIRECT REFLECTION OF THE BENEFIT OF A SELF-INSURED PROGRAM INSTITUTED AT THE CITY OF PORTLAND IN 1988.
3. The ERC graph only reflects the first 6 months of 1990 and it does not include the OR Convention Center.

METROPOLITAN SERVICE DISTRICT

CLAIMS COMPARISON

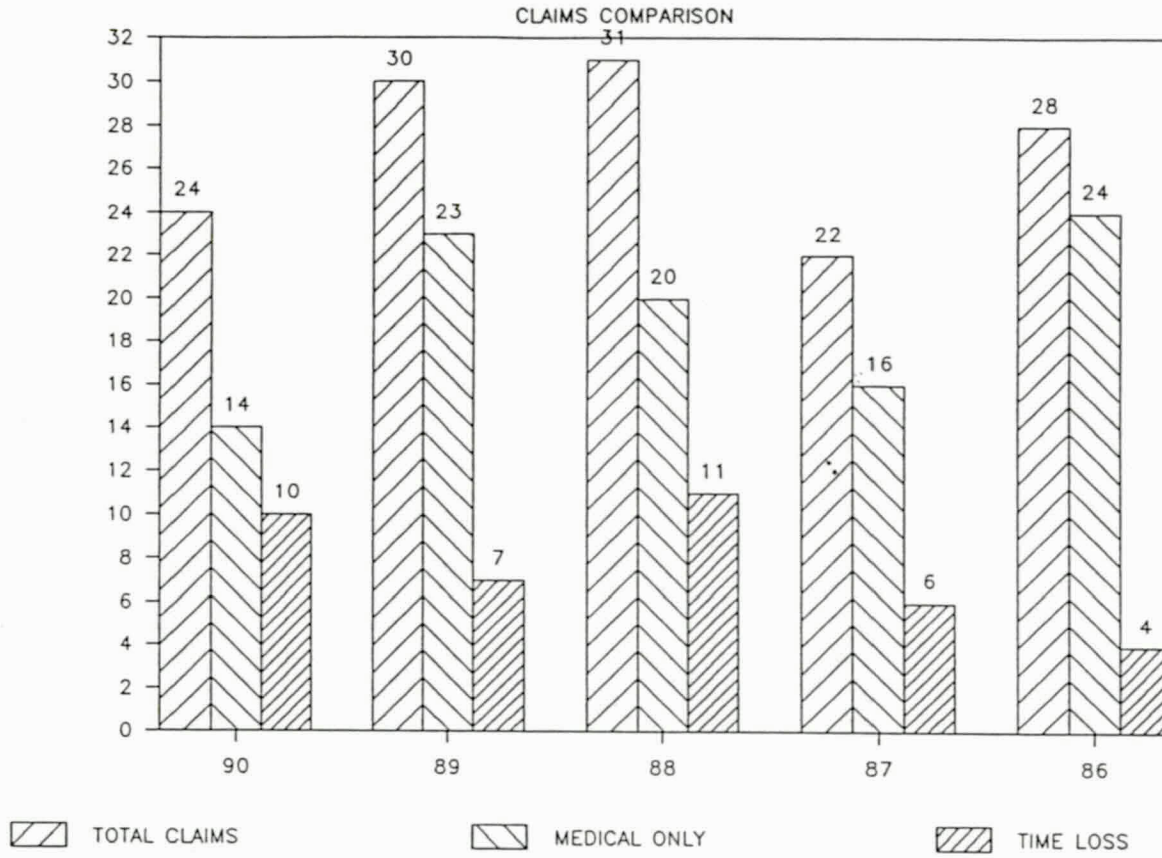


METRO CLAIMS COMPARISON

This graph reveals the following points:

1. Total claims have risen steadily since 1985.
2. Medical only claims have risen steadily since 1985.
3. Number of time loss claims have risen steadily to 1989; and although 1989-90 time loss claims declined to 4, this number does not reflect the total number of time loss days (see Time Loss Days Chart).

E-R COMMISSION



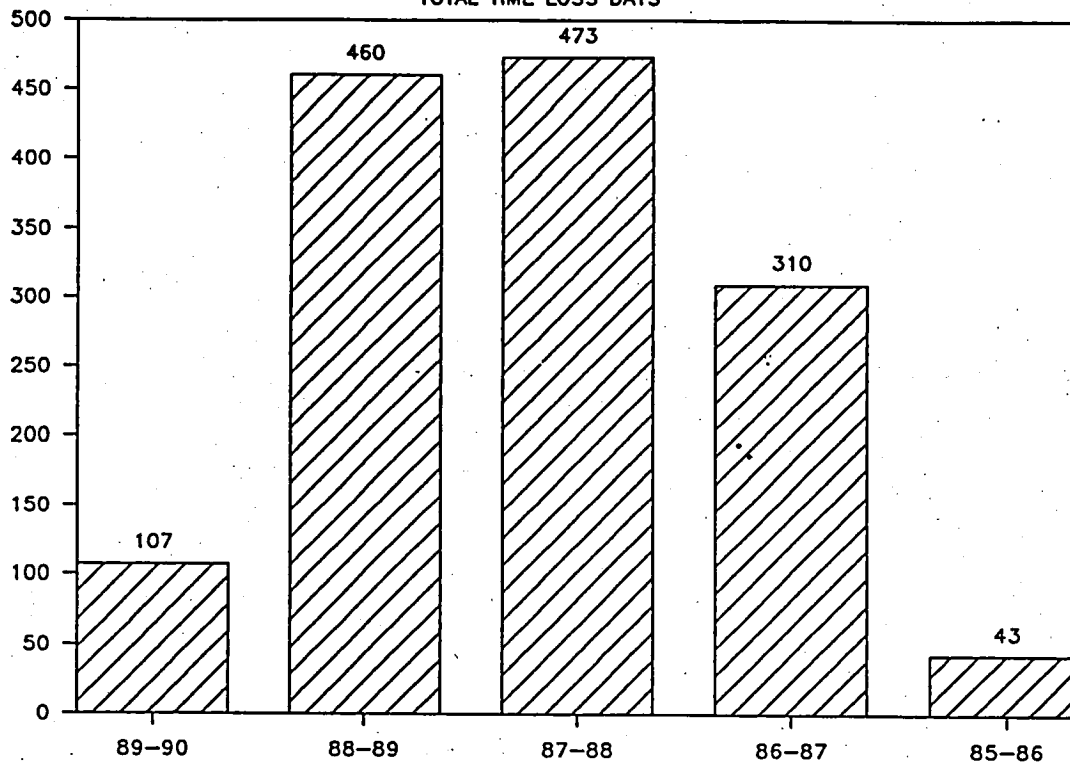
E-R COMMISSION CLAIMS COMPARISON

This graph reveals the following points:

1. From 1986-1989 claims appear to be fairly stable.
2. Claims for 1990 reflect only the first 6 months. However, claims history demonstrates the greatest claims exposure occurring in the fall months.
3. This graph does not reflect the new OR Convention Center.

METROPOLITAN SERVICE DISTRICT

TOTAL TIME LOSS DAYS



TOTAL TIME LOSS DAYS

This graph reveals the following points:

1. Since 1985, METRO time loss days have increased steadily.
2. Although 1989-90 appears to be declining, this figure does not reflect future time loss on open claims or potential time loss on closed claims with reserves.

EXHIBIT C

FY 1990-91 BUDGET NOT FOR THE
SUPPORT SERVICE FUND

5. Personnel Division: Workers Compensation Program

The Personnel Division shall provide a written evaluation of the Workers Compensation Program established as a result of the addition of an Associate Management Analyst position. The evaluation shall include 1) an analysis of the impact on workers premiums for FY 1990-91 as a result of the added position and 2) an analysis of the impact on employees affected by the program, particularly an Early Return to Work policy implemented by the District. The evaluation shall be submitted to the Finance Committee as soon as practicable at the end of FY 1990-91.

FINANCE COMMITTEE REPORT

ORDINANCE NO. 90-360, AMENDING THE FY 1990-91 BUDGET
AND SCHEDULE OF APPROPRIATIONS TO ADD ONE FULL TIME
ASSOCIATE MANAGEMENT ANALYST POSITION IN THE PERSONNEL
DIVISION

Date: September 21, 1990

Presented by: Councilor Devlin

COMMITTEE RECOMMENDATION: At its September 6, 1990 meeting, the Committee voted to recommend Council adoption of Ordinance No. 90-360 as amended. Voting in favor were Councilors Collier, Devlin and Gardner. Voting against was Councilor Van Bergen. Councilor Wyers was excused.

COMMITTEE DISCUSSION/ISSUES: Karen Delaney, Personnel Manager, presented the staff report. She indicated the purpose of the position was to start the development and management of an agency-wide workers compensation/safety program for the District. This action was deemed necessary to curb rising workers compensation costs for Metro.

Metro, on the advise of its broker of record, has changed its workers compensation coverage from a "retro premium" policy to an "incurred loss" policy. The District has budgeted a total of \$345,000 for FY 1990-91 for workers compensation coverage, but faces a potential premium liability of \$742,000. Ms. Delaney indicated an aggressive effort to manage the Workers Compensation Program in-house rather than just monitor it and rely on SAIF employees to provide service should help keep the costs as low as possible. She indicated the person in the position would work approximately 65% of the time on the Workers Compensation Program, 10% on the safety program and 25% on general recruiting and employment functions.

The total cost of the position is \$35,218. Approximately one half of the costs are to be covered by existing division funds (\$17,334) and the other half (\$17,884) from the Support Service Fund Contingency.

Ms. Delaney indicated that a key element of the Workers Compensation Program will be the establishment and implementation of an Early Return to Work policy. She gave an example of a recent incident at the Zoo where time loss payments to an injured worker were reduced significantly by working with the employee and his doctor to return to "light duty" work.

The Committee raised several questions about the program, including the financial goal for evaluating the effectiveness of the program and the potential negative impact on employees, particularly regarding the Early Return to Work policy. Ms. Delaney indicated that the Personnel Division goal is to

FINANCE COMMITTEE REPORT
September 21, 1990
Page 2

contain workers compensation costs within budgeted amounts and that the purpose of the Early Return to Work Program is not to further injure employees, but to return employees to productive work as soon as they are able to the mutual benefit of the employee and the District.

The Committee decided that an evaluation of the Workers Compensation Program at the end of the current fiscal year would be desirable and amended the Ordinance to add a Budget Note requiring an evaluation (see attached Exhibit C).

DEC:aeb
Attach.

A:\90-360.RPT



METRO

Memorandum

2000 S.W. First Avenue
Portland, OR 97201-5398
503/221-1646

Date: October 1, 1990

To: Rena Cusma, Executive Officer

From: Gwen Ware-Barrett, Clerk of the Council

Regarding: TRANSMITTAL OF ORDINANCE NOS. 90-359,
360 and 362A

Attached for your consideration are true copies of Ordinance Nos. 90-359, 360 and 362 adopted by the Council on September 27, 1990.

If you wish to veto these ordinances, I must receive a signed and dated written veto message from you no later than 5:00 p.m., Thursday, October 4, 1990. The veto message, if submitted, will become part of the permanent record. If no veto message is received by the time and date stated above, these ordinances will be considered finally adopted.

I, Unette Staley, received this memo and a true copy of Ordinance No. 90-359, 360 and 362A from the Council Clerk on October 1, 1990.

Date: Oct 1, 1990

GWPB:lc
\Mem.Ord.