

T. 1.

VANVACTOR William A

To: B/CC
Subject: Goal setting material

Goal setting, Tuesday 9:00 AM, Pubic Works training room 3, Delta Highway
Randy Harrington will be our facilitator. As always this is a public meeting so we will arrange the room to accommodate the press and members of the public.

Attached please find:

1. Lane County charter
2. A copy of our current goals (in outline format) and list of accomplishments, challenges and some suggested goals. We did not receive as many suggested goals as I had hoped. I will make one more effort Monday morning at the management team meeting. If we come up with some I will bring them to the meeting.
3. Strategic plan. See section B starting on page 22 for the discussion of Resource Planning and Allocation. Note on page 25 section B3 that in paragraph 1 the highest funding priority will be those services that are effective in addressing the immediate and critical life and health safety needs of our citizens. Note also paragraph 2 that the second funding priority is for those services that are a direct response to the County's broad goals. This is one of the reasons goal setting is so critical at this time.
4. Jaws graph
5. CAO version (The management team could not reach agreement on this) of the reduction criteria proposed for the FY 04-05 budget.
6. Old format for presenting goals from October 24, 1996.

To help set the context for this meeting one of the continuing debates we have had as a management team is what does it mean to be a general purpose government? We often hear comments like we need to stop thinning the soup and it is time to cut whole services. We need to get back to core services. That then begs the question which services do we cut? This is very difficult work and it is not likely we will resolve all of these issues in one 3 hour session. One key piece of information I would very much like to learn is whether you do want to maintain Lane County as a general purpose government. This would mean continuing to perform some non mandated services like Parks and Animal Regulation. An alternative is to strictly apply the strategic plan and if those services fall out under the prioritization process, so be it.

Finally we have kept Dec. 16th as a possible Leadership Team meeting. If you reach agreement on suggested goals those could be presented at that time. If more work needs to be done, we can easily reschedule another goal setting and Leadership meeting. That's the positive side of starting all these process this fall rather than having waited later in the year as we have done in the past.

Goals as stated in the Strategic Plan

- **Work for a strong regional economy to expand the number of family-wage jobs available in Lane County.**
 - a. Revamped Lane Metro partnership
 - b. Continued participation in Regional strategies, BL3, etc.
 - c. Continued support for enterprise tax zones, West Eugene, East Beltline, Cottage Grove
 - d. Redefined video lottery program to emphasize strategic investments
 - e. Improved economic development infrastructure, fiber, roads, Fairgrounds
 - f. Continue supporting the tourism industry, CVALCO, Fairgrounds
 - g. Continue to support the Workforce Partnership and its effort to upgrade the skills of current workers
- **Provide opportunities for citizen participation in decision-making, voting, volunteerism and civic and community involvement.**
 - a. Board agenda packet material on the web
 - b. Continue 20 plus advisory committees
 - c. Support Volunteerism by doing, i.e. Day of Caring
 - d. Continue Metro TV
 - e. Board meetings on the intranet, working on it for internet
 - f. Continued and encouraged department use of volunteers
 - g. Individual board member town hall meetings
 - h. Annual joint meetings with cities who have agenda items
 - i. Implementing HAVA, new elections building
 - j. Annual Report to citizens (In-Lane) with Survey
 - k. Low cost surveys (online polls, intercept survey at Fair and other locations)
 - l. High volume news dissemination to public - 262 releases per year
- **Ensure the provision of basic social support in the areas of health care, disease prevention, protection, poverty reduction and independent living.**
 - a. Continued support of HSC
 - b. Achieved federal government approval of a FQHC
 - c. Maximizing Homeland Security grant funds to help shore up public health
 - d. Sold annex in Florence, use funds to keep rural clinics open one more year, the balance as a down payment on new Public Health building
 - e. Preventative public information campaign with community partnership funding for West Nile virus

Challenge. We lost ground here via lost state funds for Mental Health, and were unable to obtain citizen support for Public Health building.

- **Ensure the public's safety with regard to adult and juvenile crime, emergency preparedness and regional cooperative policing through law enforcement, intervention, prosecution, incarceration, and parole and probation, while protecting individual's constitutional rights.**
 - a. With Secure Rural Schools and Community Self Determination act of 2000 we were able to increase the FWC capacity from 30 to 95 beds
 - b. Significantly enhanced Search and Rescue
 - c. Added Forest Lands Deputies
 - d. Added youth forest community work crews (day only, not residential)
 - e. Conducted a PSCC evaluation of cooperative approaches to recruitment, training, records, property management.
 - f. Board adopted Patriot Act resolution
 - g. Streamlined PSCC
 - h. Received Justice Court Task Force, implemented video conference capabilities
 - i. Established the Supervisory Authority Team
 - j. The Lane County District Attorney's Office successfully prosecutes about 8,000 criminal cases each year. This ongoing accomplishment is a critical component to the enforcement of our criminal laws. Each year there are hundreds of person crimes successfully prosecuted including murder, rape, robbery, and domestic violence. Thousands of property crimes including burglary, identity theft, forgery, and many others are prosecuted.
 - k. Established Joint Information Center (and alternate site) for disaster and public health emergencies

Challenge. With these successes we have also had significant challenges. The reduction in state funding (SB 1145) caused us to send the 180-day notice to terminate the program. While withdrawn for now, we face this potential again if the temporary income tax measure is repealed. Jail capacity is down by 119 beds. DYS capacity is reduced and Pathways capacity cut in half.

In the last budget cycle, prosecution services were reduced by approximately 8.5% due to the loss of two attorneys in the Criminal Division of the District Attorney's Office. The caseload did not change and we have merely "thinned the soup." The challenge in the next budget cycle is to restore prosecution services to a better level.

- **Contribute to appropriate community development in the areas of transportation and telecommunications infrastructure, housing, growth management and land development.**
 - a. Continued urban transition payments to cities/affordable housing/annual CIP
 - b. Converted loan program to a community development model
 - c. Active in both fiber consortiums
 - d. LMD task force recommendations partially implemented, fees increased, staffing for long range planning now at work.
 - e. Through CDBG, administer a housing rehabilitation program in certain rural portions of Lane County.
 - f. Grants to housing (and school) projects for road improvements.
 - g. Opening of Broadway
 - h. Continued numerous affordable housing programs

- **Maintain a healthy environment with regard to air quality, water quality, waste management, land use and parks.**
 - a. Continued participation in LRAPA
 - b. Enhanced fish friendly culverts, title 3 conservation easements
 - c. Adopted System benefit fee, Waste Management fund now stable
 - d. New cell, leachate facility at Short Mtn.
 - e. Parks recovering from lost funds from Low Water in Fern Ridge
 - f. Fire permit process with title 3 funds
 - g. Last resort herbicide policy
 - h. Assisted Heceta water district with land for filtration plant
 - i. Assisted So. 79th street neighbor hood with water problem
 - j. Community service crews, adult and youth clean up community facilities through grants, enhancing park facilities
- **Protect the public's assets by maintaining, replacing or upgrading the County's investments in systems and capital infrastructure.**
 - a. Established department depreciation charges to begin addressing backlog of deferred maintenance. Replaced many failing roofs as a first priority
 - b. Financed and built Mental Health building
 - c. New elections facility underway
 - d. Remodeled Sheriff's civil section, dispatch
 - e. Remodel courthouse entrance underway
 - f. ADA upgrades, numerous small projects
 - g. Doing great on roads
 - h. Adopted Parks SDC to help with infrastructure
 - i. Constructed replacement marina facilities
 - j. Digital Map GIS system underway at Public Works
 - k. PC classroom enlarged
 - l. Numerous ADA improvements to courthouse/PSB
- **Provide efficient and effective financial and administrative support and systems to direct service departments.**
 - a. New Finance Manager, reorganized finance function, Peoplesoft upgrade underway
 - b. Enhanced Human Resource function
 - c. Increased analytical capability, CAO, SO, HHS, YS
 - d. IS working on many department specific software improvements, new network almost complete
 - e. AIRS project funded and underway
 - f. Refinanced existing debt at lower rates; bonded a portion of PERS debt
 - g. Improved budget process (Brass plus change in how to process community groups, work with citizen members)
 - h. Implementing performance measures
 - i. Successfully defended state/county shared revenues
 - j. Established Retiree medical insurance fund to cover future obligations
 - k. Quarterly financial reports

Challenge. AIRS, we just received notice of 8-month delay, currently evaluating impact. In the bond refinance effort, received a negative outlook from Moody's.

Also we have the overarching or super goal of:

Improving the lives of Lane County's Youth

- a. Continue to operate New JJC (at only 1/3 of capacity)
- b. CCF remains a department
- c. DYS director has been seeking and obtaining federal entitlement funding for a portion of in custody operations
- d. Assisted National Guard to find a new location. LC now owns the old Armory and completed a major portion of the infill of the Youth Campus
- e. Making progress with the Boy Scouts to compete the youth campus infill
- f. Workforce Partnership continues to operate a year round youth program including a summer employment component
- g. The District Attorney's Office, Family Law Division, collects approximately 20 million dollars in child support each year. In reality, most of this money is spent on the basic necessities of life for children. Food, shelter, clothing, and health care for children are the staples of this 20 million dollars which is collected

Challenge. State funding, JAIBAG and JCP, has significantly declined. Also, if you look at the allocation of general fund as a commitment to this goal, the percentage to DYS has declined.

Lane County Department Heads and Budget Committee were invited to suggest goals. Set forth below are their responses, in no particular order:

Focus as much as ever on communication. Communicate consensus where possible-why we do what we do, where we fit in hierarchy of services, make sure employees understand this, encourage more opportunities to interact with schools, community groups, etc.

Be open for greater efficiencies, and where they exist, as sometimes in metro areas, communicate that. I think that road projects/public works may present opportunities in that regard. Given PERS retirements, further partnerships, or structural changes in public works might be easier to accomplish should such direction be given.

An additional goal might be to make greater use of economic infrastructure in place. We have a lot of unused buildings, Sony being just one example, that could be utilized without added strain on environment or (most) quality of life issues. We also have people here, if that needs to be said. I think this gets back to communication, this time often outside of the community, but may also provide some measurable results.

Develop and implement strategies towards reauthorizing of Secure Community Schools Act, with modifications in the legislation to increase the flexible use of the funds.

Develop an analytical model for analyzing and determining whether the County should be in a particular business, that includes the financial, political and community impacts. This could then be used for such issues as the convention business; the County fair business; animal control, etc.

Diversity Implementation Plan Phase 2.

- Maintenance of assets - provide funding for capital projects for core programs that pass a pre-determined, quantifiable screen, such as:
 - a) % reduction in long-term operating expenses; or,
 - b) net present value lower than net present value of delaying the capital project; or,
 - c) short payback period.
- Technology - Provide funding for selected hardware/software upgrades/projects for core programs that pass a pre-determined, quantifiable screen, such as:
 - a) % reduction in long-term operating expenses; or,
 - b) net present value lower than net present value of delaying the project (if the project generated revenue, than it would be a net present value higher than the alternative); or,
 - c) short payback period; or,
 - d) positive benefit-cost ratio.
- Defund programs that could be privatized or transferred to another agency for a lower cost than if provided by the County.
- Give a higher priority to core programs that can quantify cost-effective delivery of service than those that cannot.
- Eliminate programs that cannot be funded at a minimum threshold.

ADOPTED LANE COUNTY STRATEGIC PLAN

Lane County's Mission, Vision and Guiding Principles

At every level of Lane County Government – from office workers and maintenance crews to elected officials and volunteers – we strive to make the best possible use of your tax dollars to deliver the services and programs you expect and need. Our mission, vision and guiding principles reflect our sense of duty and expressed commitment to every citizen of Lane County.

I. Our Mission

The mission of Lane County Government is to provide high quality local government services in a fair, open and economical manner to best meet the needs and expectations of our citizens and our guests.

II. Our Vision

Lane County Government is trusted and respected as a dynamic and innovative organization that provides high quality services.

III. Our Guiding Principles

ACCESSIBILITY

All citizens and employees, regardless of abilities, will have ready access to our services and facilities. Language and culture will not be barriers. Our processes will be open and fair to all.

ACCOUNTABILITY

We will ensure public funds provide priority services our stakeholders want and need. We will always strive to get the most benefit from our available resources. We will always act in accordance with the law, with integrity, and in the public interest.

CUSTOMERS

We will be customer-driven, both internally and externally. We recognize customers as our central focus and will treat them with courtesy and respect. We value our customers and are committed to providing quality service and customer satisfaction.

DIVERSITY

We will treat all people with dignity and respect. We will demonstrate through our actions an understanding and appreciation for cultural diversity and individual differences. We absolutely will not tolerate sexual, religious, racial harassment or discrimination.

VALUED EMPLOYEES

We will enable employees and teams to self-manage their work and expect them to be accountable for their decisions and actions. Our success depends on the success of our

individual employees. We will strive for good physical working conditions for employees and visitors as well as up-to-date equipment. We recognize each individual is a unique and contributing member of our organization. We will recognize and reward people for hard work, creativity, innovation and prudent risk-taking.

PURSUIT OF EXCELLENCE

We are committed to quality and excellence. Innovation and calculated risk-taking are essential. We are committed to continuous improvement and creativity. We will look ahead and will not be satisfied with the status quo.

MISSION-DRIVEN

We are driven primarily by our mission, not by rules. We need fewer rules, less rigidity and less bureaucracy. We believe flexibility and responsiveness can be achieved while also maintaining accountability.

INTEGRITY, LOYALTY, AND TRUST

We believe that ethical conduct is paramount and it will be a trademark of our organization. We will strive to create an environment of trust and loyalty, and civility which comes from open, honest, and direct interactions with each other and our customers. Fostering this environment reinforces our belief that people can and will do the right thing.

STEWARDSHIP

We are committed to the most efficient use of the public's resources. We will invest in our people, systems and facilities. Capital and system investments will be maintained, replaced and or upgraded as needed to sustain the value of the public's assets.

TEAMWORK

We will enhance and support teamwork and teambuilding in our organization. We will strive for a professional and cooperative working relationship with employee and citizen groups. We believe joint problem-solving, increased involvement and shared decision-making with employee groups will contribute to higher staff morale and enhanced productivity.

IV. Lane County's Goals

Lane County Government exists to ensure the safety and well being of the people who live, work and visit our communities. That includes personal safety, security of property, preservation of infrastructure, health safety, and assisting in providing for our citizens' basic needs. Lane County places special emphasis on programs that serve youth, incorporated into and consistent with the following overall goals:

- Work for a strong regional economy to expand the number of family wage jobs available in Lane County.
- Provide opportunities for citizen participation in decision-making, voting, volunteerism and civic and community involvement.

- Ensure the provision of basic social support in the areas of health care, disease prevention, protection, poverty reduction and independent living.
- Ensure the public's safety with regard to adult and juvenile crime, emergency preparedness and regional cooperative policing through law enforcement, intervention, prosecution, incarceration, and parole and probation, while protecting individuals' constitutional rights.
- Contribute to appropriate community development in the areas of transportation and telecommunications infrastructure, housing, growth management and land development.
- Maintain a healthy environment with regard to air quality, water quality, waste management, land use and parks.
- Protect the public's assets by maintaining, replacing or upgrading the County's investments in systems and capital infrastructure.
- Provide efficient and effective financial and administrative support and systems to direct service departments.

County departments will continue to develop specific and measurable objectives consistent with these overarching goals. Departments will articulate measurable results that focus departmental objectives, plans, strategies and activities, and will evaluate department performance in achieving the planned results.

V. Lane County's Core Strategies

Lane County Government has established several core strategies. These establish the priorities that will guide our actions. They describe how we will act consistently with our mission and guiding principles to achieve our vision and goals.

Overall strategic theme: To build and maintain credibility and trust we understand that we must both perform well and remain accountable to the public for our performance. We must continually improve our services and allocate our resources wisely. We must listen carefully to our citizens and do our best to effectively inform them how our actions are addressing their concerns.

List of Strategies

A. Service Improvement

- A1 – Evaluate reorganization opportunities
- A2 – Develop more flexible staffing
- A3 – Promote electronic access to public services
- A4 – Promote continuous quality improvement

B. Resource Planning and Allocation

- B1 – Develop plans for the chief resources applied to deliver County services – human resources, information technology, and land and facilities
- B2 – Refine the communications plan
- B3 – Allocate resources strategically

C. Performance Management

- C1 – Refine Countywide goals
- C2 – Refine planning at the department level
- C3 – Strengthen analytical capabilities
- C4 – Remain accountable for strategic plan implementation

D. Revenue Development

- D1 – Develop balanced revenue strategies
- D2 – Identify and recover user fees and charges
- D3 – Pursue entrepreneurial opportunities
- D4 – Pursue intergovernmental revenue and private donations
- D5 – Develop timber revenue strategies

A. Service Improvement

A1: Evaluate reorganization opportunities

["Reorganization" as defined, includes the host of restructuring and reengineering opportunities including but not limited to: consolidation; contracting with or depending upon another provider; co-location; use of different media for service delivery (such as video judicial processes, electronic records dissemination, electronic reporting).]

- a. Lane County Government will actively seek to improve the efficiency, effectiveness, and quality of public services by considering reorganization of service delivery systems both within county government and across government agencies. We will examine areas where similar or closely related services reside in different organizational units.
- b. Evaluation criteria will include: (1) the size of any cost savings potential; (2) the impact on service quality and service levels; (3) the degree of similarity in functions; (4) public support of reorganization; and (5) the degree of cooperation from the relevant external entities (for intergovernmental reorganizations).
- c. We will evaluate the feasibility of further reorganization of the following county support services:
 - Fleet services
 - Personnel and human resources services
 - Accounting functions
 - Grounds maintenance
 - Engineering services
- d. We will also evaluate possible reorganizations across County departments, including:
 - Public Safety corrections services and Health and Human Services probation and parole
 - Commission on Children and Families and Health and Human Services
 - Economic development programs and contracts
 - Animal control and law enforcement
- e. We will give early priority to evaluation of intergovernmental reorganization opportunities in the following *direct service* areas:
 - Land use and building planning and development
 - Public safety police functions
 - Public safety corrections functions
 - Road maintenance and engineering
 - Solid waste
 - Courts
 - Airports

- Regional planning (LCOG)
- f. We will also evaluate and consider intergovernmental reorganizations for *support services*, including:
- Fleet services
 - Information technology
 - Financial systems
 - Public employee benefits
- g. We will be proactive and assert intergovernmental leadership in the specified areas. We will look for opportunities where the constituents of each agency involved will receive a net benefit in reorganization. Where intergovernmental reorganization is either not feasible or the most desirable approach we will pursue stronger inter-agency planning and coordination, giving initial priority to the direct services areas listed above. We will also assess the potential benefits of co-location of services, including facilities for the following:
- Law enforcement
 - Corrections
 - Health and human services
 - Road maintenance
 - Information technology
 - General government facilities
 - Transportation

A2: Develop more flexible staffing

- a. Lane County Government's personnel policies will promote employee accountability and the matching of rewards to performance. We will strive for a flexible classification and compensation system. County managers and bargaining units will work together to ensure that the system supports and does not inhibit excellent performance in the delivery of County services.
- b. All officials, managers, and employees will be expected to cultivate the knowledge and skills necessary to perform their responsibilities well. Personnel policies will encourage job-related training and career development support. As a consequence, each employee will be responsible for contributing to the overall success of the County by performing his or her job to the best of his or her ability.
- c. Management policies will encourage employee involvement in decisions on how to perform work in the most effective and efficient manner possible. We will also explore the use of empowerment policies such as self-directed work teams and cross training.
- d. Lane County will strive to foster a work environment in which an employee's diverse character and talents are recognized, supported and applied to maximizing the County's ability to attain its goals. To this end the County will strive for flexibility in

the workplace so to encourage and assist all employees to succeed in the performance of their duties.

- e. Lane County Government supports contracting out as one option to consider for assuring the efficiency and effectiveness of its services. In evaluating any contracting out opportunity we will comply with labor contract and other legal requirements and will consider qualitative as well as cost factors.

A3: Promote electronic access to public services

- a. Lane County Government will promote expanded electronic access to County services, through the Internet and other related approaches. However, where electronic alternatives are developed, more traditional options (face-to-face or telephone service) will also be preserved. We will encourage the development of public access Internet sites in all areas of the county so that persons without electronic access at home may have access. Both informational applications (answering citizens' questions about County services) and transactional applications (allowing persons to complete business with the County, such as filing permit applications) will be developed. We will also develop Internet applications that enhance public participation in County government. Priorities for development will be established based on the following criteria:
 - The application will either generate cost savings without sacrificing service quality, or will enhance service quality or accessibility at an acceptable cost.
 - The up-front investment required is justified by the expected benefits of the application.
 - A sound technical and design approach has already been demonstrated; there will not be much technical risk.
- b. Design standards will also be established and implemented to promote the usability, flexibility, consistency, and quality of the County's Internet applications.
- c. We will give early priority to evaluation of Internet application development opportunities that meet these criteria in addition to those listed above:
 - The applications support current revenue generating processes and/or the applications has the potential to generate new revenue.
 - There is an established customer base (perhaps professionals) that use personal computers.
 - There are customers who expect to pay for the service (and may experience savings in time and money by using the Internet).
 - There is an existing database to support the application.
 - A framework of countywide user policies and fees are in place.
- d. Applications that appear to meet these criteria include:
 - Assessment, taxation
 - Deeds and records
 - District Attorney Case Management System information

- Law enforcement data for media access
- Land Management Services (permits, etc.)
- Engineering plans and specs
- Highway traffic volume counts
- Food handler exams

A4: Promote continuous quality improvement

- a. Lane County Government encourages continuous process improvement efforts initiated by work units in County departments.
 - We will work to establish rewards for successful innovations initiated by both individual employees and teams of employees, and to remove barriers that could inhibit innovation.
 - “Gain sharing” programs and procedures will be explored to encourage process improvement efforts
- b. Under these programs a meaningful portion of any demonstrable cost savings resulting from work unit process improvement initiatives will be budgeted to support investment in further process improvements and efficiencies or enhancements in the quality of working conditions for the relevant work unit(s) or department(s), or to support overall County allocation priorities.
- c. The purpose of process improvement is not the displacement of employees from their positions. However, when vacancies occur, it is in the best interest of the County and its citizens to review work processes and to determine whether the vacant positions and associated resources can be better utilized.
- d. As part of the County’s Succession Plan, we will focus on retaining current employees and ensuring they possess the knowledge, skills and abilities to perform their jobs well. To this end, the County will develop career ladders and work to encourage employees to become prepared for desired promotional opportunities. Additional strategies will be considered to motivate employees to pursue appropriate training, which will increase their chances for success in their work and better qualify them to fill future vacancies.
- e. We will look for ways to build on the research and experience of others (e.g., U of O’s “3PM”, the Graduate School of Business, other higher education institutions, external consultants, other comparable public agencies, etc.) to assist County departments in conducting process improvement efforts and other efficiency initiatives.

B. Resource Planning and Allocation

Before Lane County can allocate its resources effectively, it must first identify what its key resources are. Chief among the key resources are the employees and volunteers who provide services to Lane County's citizenry. Next are the information and technology resources that the County has or can develop for staff and the public and the lands, facilities and other physical holdings entrusted to the county's stewardship. Once these resources have all been identified, the County must then develop a strategic plan for how each of these resources can best be utilized to meet its goals and objectives.

B1: Develop plans for the chief resources applied to deliver County services – human resources, information technology, and land and facilities

- a. Lane County Government will develop a human resources plan. The Human Resources division will direct and coordinate the overall planning effort. Departments will bring specific issues to Human Resources for resolution. Human Resources would then report back to respective department with a plan of action for their approval. This plan will:
 - Analyze future workforce needs (consistent with this strategic plan).
 - Assess current workforce capabilities in relation to the future needs (accounting for expected retirements and turnover).
 - Identify actions to assure that workforce capabilities meet future needs.
 - Evaluate how the County's personnel policies will promote employee accountability through performance objectives and then recognize performance through appropriate reward systems.
 - Aim for a flexible classification and compensation system so that the system supports and does not inhibit excellent performance in the delivery of County services.
 - Specify policies and practices to encourage training and development supports so employees have the knowledge, skills, and abilities to perform well.
 - Identify management policies and practices to encourage employee involvement in decisions on how work will be performed.
 - Seek to strengthen career paths with County, to strengthen leadership abilities of managers and supervisors, and to assure successful succession transitions for positions where incumbents retire.
 - Establish how the County's commitment to diversity will be met through hiring, retention, promotion, and training practices.
 - Analyze Human Resources Division capacity to implement the plan.
- b. We will establish an information technology plan to guide the County's future investment in technology. The plan will:
 - Analyze the County's future business needs (consistent with this strategic plan) and trends in the state-of-the-art of information technology.

- Assess the County's current information technology in relation to future needs and identify actions to assure that the County appropriately applies information technology to meet future needs.
 - Include a strategy for Geographic Information System (GIS) coordination, maintenance and funding.
 - Review the County's current use of regional information technology services, including AIRS, GIS, RIS and Telephone Services, and recommend a strategic vision for when it is appropriate for the County to partner with other public agencies in the use of such services.
 - Establish how Lane County government will cooperate with small cities such as Florence, Cottage Grove, Oakridge, and Junction City, as well as other public agencies within the county, to ensure that the benefits of information technology will be available throughout the county.
 - Identify how both Internet and Non-internet platforms and applications will be appropriately supported.
 - Be compatible with the strategies included in the strategic plan, including the strategy for electronic access to County services.
- c. Lane County Government will conduct an inventory of all of its land and facilities and holdings, including leased space where the County is the lessee or lessor:
- For land or facilities that the County owns the inventory will identify the value of each holding, the current use, the long-term use identified currently (if any), size, location, zoning, and restrictions and the potential for lease, sale, or other revenue generation.
 - The lease term, cost per square foot, total cost, and comparable private sector pricing will be provided for leased space where the County is the lessee or the lessor.
 - The general physical condition of all occupied facilities and their life expectancy will be assessed.

Based on this inventory, Lane County will establish policy and decide the disposition or retention of assets and will develop a master plan for existing and future facilities. Any long-term commitments involving space will be based on this master plan. The master plan will:

- Identify ways to reduce costs (lease savings) or improve service (co-location convenience for customers and clients) through space consolidation.
- Identify ways to improve space and facilities conditions to better serve citizens, insure the adequate maintenance of existing infrastructure, and provide an environment conducive to high employee productivity.
- Reflect a high priority for preventive maintenance as the preferred maintenance strategy, as opposed to deferred maintenance
- Identify the financing approach for any major new planned developments.

B2: Refine the communications plan

- a. Lane County Government recognizes that efficient and effective use of its resources requires strong communication. This includes effective communication with the public, internally among County personnel, and between County departments and other agencies that work with the County. Toward that end, the County will refine its communications plan, taking into consideration:
 - Methods to promote public participation in County decisions and to give County officials a way to “listen” as well as to explain
 - Simple understandable ways to communicate financial information to employees and the public
 - Methods to simply explain the County’s role and services to the public
 - Methods to assure that employees are sufficiently informed about the services not only of their own department, but of others as well
 - An annual report to Lane County citizens

B3: Allocate resources strategically

- a. The County’s funding priorities are as follows:
 1. The County’s highest funding priority will be those services that are effective in addressing the immediate and critical life and health safety needs of our citizens.

Priorities will be guided by the relative severity and immediacy of the threat to life and health safety and or the effectiveness of long-term or future deterrent to threats that the service provides. For prevention services, early intervention will be a higher priority than later intervention.
 2. The second funding priority is for those services that are a direct response to the County’s broad goals. Primary emphasis will be placed on services that relate to
 - Personal safety
 - Property safety
 - Infrastructure safety
 - Health safety
 - Basic needs
 - Programs serving youth
 3. The third funding priority is services that are mandated and that do not otherwise fall into the categories addressed by the first two priorities. The level of funding for these functions and the level of service provided may be flexible and will be guided by the demonstrated cost-effectiveness and broad public support of the services.
 4. The County will also fund services where there are sound fiscal reasons to do so, and where the service contributes to the attainment of the County’s broad goals. The following factors will be considered:

- The service generates revenue (beyond indirect) for the General Fund.
 - Funding the service has no indirect negative impact on the General Fund.
 - The service helps to leverage funds that support other high priority services.
 - The service is supported by funds that cannot be diverted to the General Fund.
 - The service generates revenue for Lane County citizens.
5. To cost-effectively provide direct services to the citizens of Lane County it is essential that the County fund certain central support services. The most essential support services are those that
- Reduce risks of loss,
 - Maintain infrastructure,
 - Assure sound fiscal management and accountability,
 - Support human resources, or
 - Directly support the Board of Commissioners (both administration and policy support).

Next are other services that provide support to direct public service departments.

The remaining support services are those that provide Countywide coordination.

Additions or reductions to these support services functions should be as proportional as possible to corresponding changes in the funding of the County's direct services to the public, recognizing that some costs for support services are fixed and some are variable, proportional to the entire organization's budget and/or staffing levels.

To the extent possible based on available funding, Lane County will maintain reserve funds to address possible future funding shortfalls or other fiscal contingencies. The County will establish criteria to guide the size and possible uses of this fund.

6. Other priorities consistent with the broad goals in this plan will be further defined as this plan is implemented. The services must be ones that are known to be cost-effective, a significant improvement for citizens, and ones where there are either no other providers or the County service is (or is expected to be) broadly utilized.
- b. The following resource allocation principles will apply to all budgetary situations:
1. Services of countywide benefit are to be funded by a broad-based revenue structure, such as countywide property taxes and other general-purpose revenues.
 2. All other factors being equal, the County will attempt to retain or achieve maximum flexibility with its revenue sources, but will comply with all legal requirements constraining the application of non-General Fund revenues.
 3. In seeking new sources of revenue, those that allow more flexible spending will be given priority over those that are restricted. However, the County also

recognizes in some cases it may be more acceptable to taxpayers or the payers of user fees that certain revenues be dedicated to particular purposes.

4. The County will attempt to leverage its County dollars as much as possible. For example, other factors being equal, higher priority will be given to funding those services or programs where the investment of County dollars matches funds provided by the state or federal government or others and a County match is required in order to receive the non-County funds.
 5. In considering the costs and benefits of particular services and programs, the County will always take into account possible inter-departmental or intergovernmental impacts and the possible future cost impacts for Lane County citizens.
 6. Any services or programs that are largely or wholly supported by time-limited grant or contract funds received from the state or federal government or other sources will be considered to automatically sunset at the expiration of the grant or contract. Exception will be made on the basis of alternative funds availability or service shifting within departments.
 7. A distinction will be made between those General Fund supported countywide services that, to the extent resources are available are slated for growth in General Fund support, and those that will receive constant or decreasing General Fund support.
 8. Lane County will seek funding for innovative projects that can benefit Lane County citizens; consistent with the other principles stated here.
 9. The County will strive for a balance between administrative/operational support services and the services that are directly delivered to Lane County citizens.
 10. The County will appropriately fund infrastructure maintenance and replacement.
 11. The County will continually examine perceived redundancies in administrative and professional services in the context of impacts on the effectiveness and efficiency of service delivery to Lane County citizens.
- c. If the County was to receive additional revenue sufficient to support its existing services at current levels or was able to generate savings in current services, the first priority is to establish prudent reserves for future contingencies.
 - d. The following principles will apply if reductions are required because of cutbacks in revenue:
 1. To the extent possible, across-the-board reductions will be avoided. Reductions will be made on the basis of established criteria.

2. Before cuts are made in critical public safety services, the County will consider possibilities for re-direction of revenue that supports other services.
3. When service reductions are required, the County will consider elimination of entire services before considering incremental cuts. Emphasis will be placed on quality. If the County finds that funds are not sufficient to provide a quality service then the service may be terminated. Or, the County may limit the number of recipients of a service, rather than cut the quality of the service provided to the remaining recipients.
4. In the event of reductions, every effort will be made to appropriately fund infrastructure maintenance and replacement. In the past we have sacrificed facilities for short-term gains; we do not want to do that in the future.
5. General Fund reductions, if necessary, will be made considering the following options:
 - Reduce/eliminate financial support to outside agencies that are not funded by a dedicated revenue source and not controlled by the Board of Commissioners (applies to those programs that would not be delivered directly by the County if the outside agency did not exist).
 - Make service level reductions on a case-by-case basis, in accordance with established criteria, focusing first on areas where there is discretionary General Fund support.
 - Propose new sources of discretionary revenue, or un-dedicate sources that are now dedicated but where the County has the authority to make a change.
 - Make program reductions, following established priorities, distinguishing those that are dependent primarily on County discretionary revenue from those affected by State-shared revenue.
 - Recognize/encourage innovations which reduce General Fund use.
 - Authorize debt re-structuring.
6. Road Fund priorities will be as follows:
 - Operation, maintenance, and preservation (OM&P) of the existing County road system will receive the highest priority.
 - To the extent possible, OM&P activities should be funded by user fees from the State Highway Fund and timber receipts.
 - Timber receipts, beyond those needed for OM&P, should be used to fund modernization projects and revenue sharing.
 - If modernization projects decrease significantly in the future, and the County is not able to contract for design services with other agencies, staff resources devoted to modernization projects will decrease accordingly.
 - County/City Road Partnership payments will be maintained through the plan period (and then re-evaluated).

- e. No service will be reduced below a floor that places the safety of citizens or County employees substantially at risk.

C. Performance Management

C1: Refine Countywide goals

- a. The County will continually review its mission, vision and guiding principles for future service delivery. Consistent with the review and with input from its citizens, the County will identify quality-of-life goals that it deems to be the highest priority goals for Lane County services. In selecting each priority the County will take into account both the importance of the goal and the County's ability to favorably influence results related to the goal. The selected goals will be measurable. The County will engage in a goal-setting process periodically, consistent with the strategic planning cycle.

C2: Refine planning at the departmental level

- a. In conjunction with proposed budgets, each County department will prepare an annual plan that indicates which countywide goals are addressed by each proposed program or service of the department. Departmental strategies to help achieve the highest priority goals will be identified in the plans. The plans will indicate how the strategies are consistent with the County strategic plan and how the results will be measured and evaluated (with a goal of not duplicating the measurement and evaluation requirements of other funding sources).
- b. Lane County Government will require all departments to establish and maintain quantitative, meaningful, and useful performance measures linked to County goals and strategies. Measures should include indicators of program effectiveness (outcomes); units of work accomplished (outputs), costs per unit of work (efficiency), service quality, customer satisfaction, and service accessibility. Where selected Countywide end outcomes are relevant to a department but not wholly within the control of that department; the department should identify the key intermediate outcomes it expects to achieve that contribute toward achievement of the end outcome. The County will provide appropriate and timely training to departments in the development of performance measures.
- c. Each department will report its performance for each of the selected performance measures at least annually. The departments will apply the performance measurement results in formulating their plans and budgets.

C3: Strengthen analytical capabilities

- a. Analytical resources are necessary to implement our strategies. We recognize that our analytical resources are limited and that we must determine priorities for where these resources will be assigned. There are three kinds of analysis to be done:
 - Performance – effectiveness, efficiencies, comparisons with industry standards, best practices, cost per unit of work, etc.

- Accomplishment toward reaching County goals, Department goals and Benchmarks.
 - Customer Satisfaction – 1) the degree where complaint is filed or made directly to personnel and 2) public perception of needs met in courteous and timely manner.
- b. Analysis of the County's diverse service delivery system will require centralized and decentralized approaches. Therefore, its analytical capability needs to be strengthened at the department level and in County Administration. In order to maximize the effectiveness of this dual approach, we will:
- Determine which analysis is most appropriately centralized (County Administration) and which is most appropriately decentralized (Departments).
 - Develop standards for analysis to ensure consistency between centralized and decentralized outputs.
- c. We will attempt to leverage our analytical capacity by matching the most appropriate resource to each high priority analytical task. Possible resources include, for example:
- Central County Administration staff
 - Department personnel
 - Personnel shared across departments
 - Internal auditor
 - Consultants
 - Peers in other jurisdictions
 - State or federal agency personnel
 - Professional associations

C4: Remain accountable for strategic plan implementation

- a. Lane County is committed to successful implementation of this strategic plan. To help guide implementation, within three months of adopting the plan we will develop implementation schedules for those strategies deemed to be the highest priorities. Implementation schedules will be developed for other strategies over time as the plan is implemented and to respond to any shifts in priorities.
- b. Implementation plans will specify:
- Major tasks necessary to implement the strategy
 - Persons or groups assigned the lead responsibility for each major task
 - Timelines for the major tasks
 - Estimates of resources required for each major task
 - Expected end products or key deliverables related to the strategy
- c. Lane County will monitor progress against the implementation plan for each strategy. Corrective actions will be initiated, where appropriate, in cases where the implementation varies from the plan.

- d. Initially, the highest priority strategies include (these may be modified as the plan is implemented):
- Allocate resources strategically
 - Develop plans for the chief resources applied to deliver County services
 - Develop balanced revenue strategies
 - Evaluate reorganization opportunities
 - Identify and recover user fees and charges
 - Refine Countywide goals
 - Strengthen analytical resources
 - Develop timber revenue strategies
- e. The County will review and replace or modify this strategic plan at least every five years.

D. Revenue Development

D1: Develop balanced revenue strategies

- a. Developing and maintaining sufficient and balanced sources of revenue are keys to the success of our strategic plan. Without adequate resources we will not be able to provide Lane County citizens the high quality services they want and deserve.
- b. Lane County Government will sponsor referenda for local revenue measures when and if the Board of County Commissioners determines it is appropriate to do so.
- c. We will examine the relative merits of the following:
 - Supporting citizen-led initiatives
 - Establishing alternative budget authorities, such as special revenue districts and an elected lay budget authority
 - Presenting tax measures as single issues, a series of issues, a menu of issues, and/or a smorgasbord of issues
 - Creating a special law enforcement district.

D2: Identify and recover user fees and charges

- a. Lane County Government will assure that fair and reasonable user fees are established and collected for those services where state law permits such fees and where the usage of the service is affected by consumer choice. We will follow the following principles:
 - Those who benefit should pay, and those who pay should benefit.
 - However, the County will seek to assure that persons are not prevented from receiving essential services because of inability to pay. Sliding fee scales based on income will be established for essential services.
 - Fees will be based on costs, including reasonable allocations of overhead and a fair return on investment, where appropriate. In setting fees the County may sometimes discount fees below costs after taking into consideration the historical level of the fee and user sensitivity to the charges, but where it does so there must be clear policy justification for any discounts. The County will also assure that the costs used as the basis for fees reflect efficient levels of operation of the service.
 - Fees will not be charged where the costs of collection would be unreasonably high in relation to the potential revenue.
 - The County recognizes that, while it will be able to charge for some services, such as use of the County Fairgrounds by profit making organizations, it may not wish to charge for other services, such as health care services for the poor.
- b. We will review all of our services for compliance with the stated fee policy and for fee collection procedures. We will give early priority to evaluation of possible user

fees and collection procedures for selected services with due regard to citizen access. These include, but are not limited to the following:

- Parks
 - Utility uses and activity in rights-of-way (would require change in state law)
 - Animal control
 - Commercial hazardous waste disposal
- c. The County will evaluate reasonable system development charges for roads, storm water, and parks facilities serving new residential, commercial, or industrial developments in unincorporated areas of the County.

D3: Pursue entrepreneurial opportunities

- a. Lane County Government will identify services it can offer that would potentially generate additional revenue. To this end we will encourage public-private partnerships where otherwise consistent with the County's overall policies and goals.
- b. We will apply the following principles to identify entrepreneurial opportunities: (1) the service involves an area where the County has a unique capacity to provide the service; (2) or there is a need for a broad public good or service that is currently under-served and private business has not stepped in, or is not likely to, to address the need; (3) or the activity would otherwise support a public purpose. Further, (4) the risks are acceptable.
- c. We will further evaluate opportunities meeting the criteria outlined above to take into account: (1) the net revenue potential in relation to the risk; and (2) the degree of public and private business support or opposition to County involvement in the proposed enterprise. Initially we will explore opportunities in the following areas:
- Parks and recreation facilities (including campgrounds, conference centers, golf courses, and other sports facilities)
 - Road maintenance and engineering services for both government and private entities
 - Fleet services for other government agencies
 - Secure custody housing (adult and juvenile) for other jurisdictions or programs
 - Information technology services for government agencies
 - Marketing of geographic information system (GIS), property records, and other enhanced data developed by the County (including selling through intermediaries such as LCOG)
 - Rural technology infrastructure and business support development

D4: Pursue intergovernmental revenue and private donations

- a. Lane County Government will maintain a legislative advocate to supplement the efforts of statewide and national organizations that represent county government. We will advocate for legislative actions based on annual County priorities.

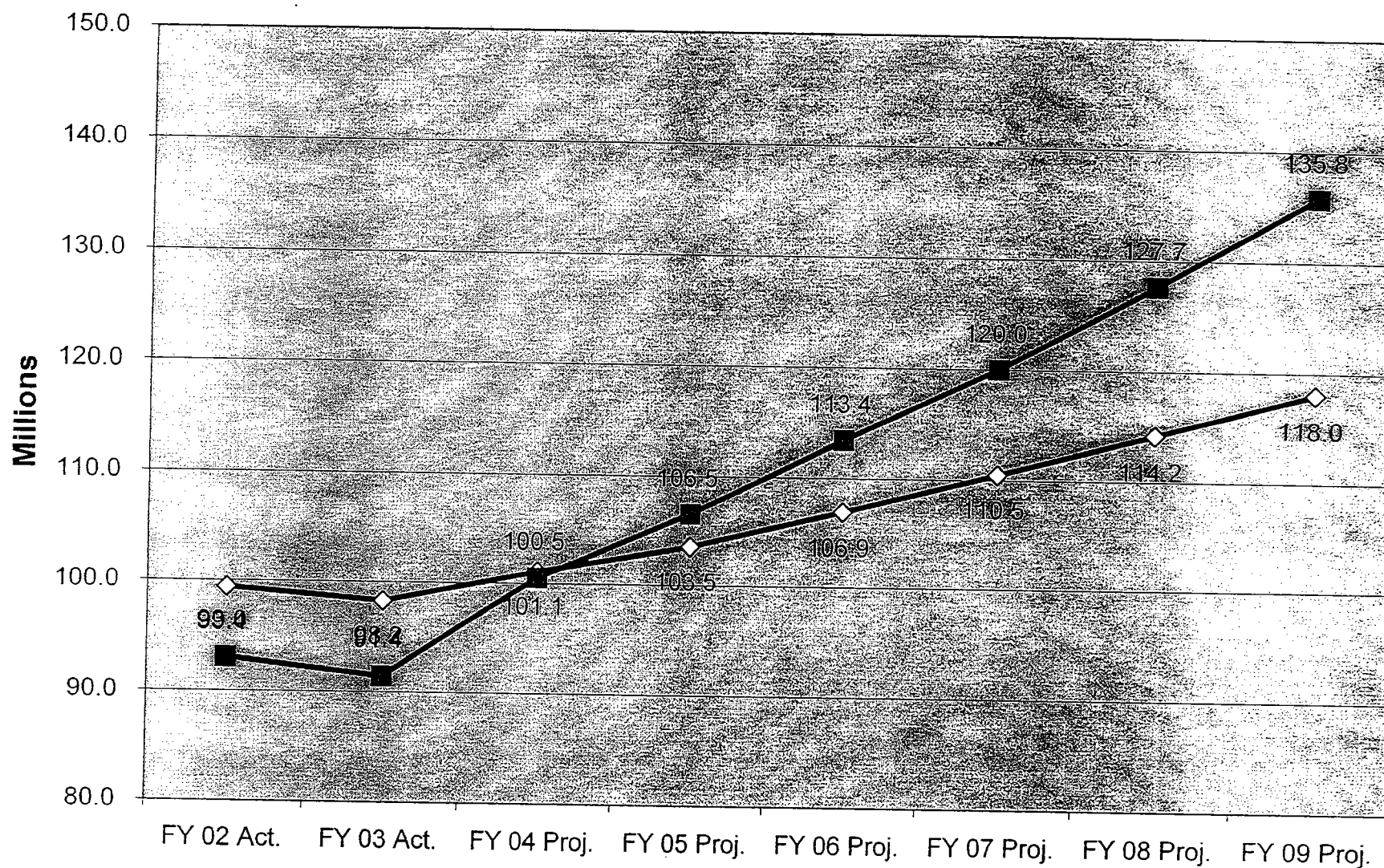
- b. Lane County may consider retaining a resource developer to pursue state, federal, and private grants and private donations and develop a list of priority service areas where such funding will be sought. Individual departments may continue to seek grants using current resources.
- c. Lane County will assess establishment of a private foundation to help support high priority County services.

D5: Develop timber revenue strategies

- a. Lane County will prepare a plan that identifies strategies and actions to ensure continuation of county payments from the federal government under Public Law 106-393.

*Y. County, City and
Finance Mtg*

Lane County, Oregon Five-Year General Fund Forecast



Annual Growth Assumptions: 2%
COLA, 2.2% Inflation & 15% Health

◆ Total Revenue ■ Total Expense

Uncertainties: Timber Payment
Renewal, PERS Reform, State
Funding Stability, Health Costs

Proposed Reduction Criteria

This is a reworking of the previous decision tree to arrive at criteria for ranking direct public services. Services are ranked from Highest to Lowest Priority. Reduce or eliminate from the bottom up.

Highest Funding Priority – Last to be Reduced/Eliminated

- 1st Immediate response to Life/Health/Safety matters.
- 2nd Prevention services.
- 3rd Services which provide deterrence or treatment.
- 4th Non-Mandated but linked to county goals.
- 5th Mandated and linked to county goals – reduce to minimal funding level.
- 6th Mandated services – eliminate if not linked to county goals and low risk.
- 7th Non-Mandated services with no direct link to county goals.
- 8th Low or minimal leverage of other revenue.
- 9th Low ROI/low efficiency/few public served.

Lowest Funding Priority – First to be Reduced/Eliminated

FY 96/97 COUNTY-WIDE GOALS

CHAMPION	SUPER GOAL	BENCHMARK ACCOMPLISHMENTS FOR 6-30-97	DONE
Bill V.V. & Bobby G.	Agreed Upon Direction for Stabilizing Revenue Base	Direction selected and agreed upon.	
	GENERAL GOVERNMENT		
Doug Harclerod	PSCC Master Plan and S.B. 1145 Requirements	List S.B. 1145 Benchmarks.	
David Suchart	Employee Safety	Adoption of weapons policy. Completion of procedures for Weapons & Workplace Violence.	
David Suchart	Diversity Implementation	Organizational assessment completed. Recruitment program changes in place. Criteria developed for performance evaluations. New county facility access guidelines in place.	
Bill Van Vactor	Public Information Program Up and Running	Employment completed or contract let. Major initiatives completed, e.g. levy mailing, TV, etc.	
Sheriff	Law Enforcement District Being Developed	Options developed. Options picked. Plan amendment underway.	
	TECHNOLOGY		
Ben Wilson	Financial System Data Processing Conversion	Contracts awarded. Project management structure in place. CPM schedule publicized.	
Jim Gangle	A&T Data Processing Conversion	Contracts awarded. Project management structure in place. CPM schedule publicized.	
Ben Wilson	Develop and Implement Lane County Intranet / Internet Pages to Improve Internal and External Communication	In production (November 1). County-wide focus of services provided by Lane County Government. Deeds & Records, Voters, A&T, mainframe data available.	
Ben Wilson	Upgrade Lane County's Technology Infrastructure to Facilitate Implementing Client-server Applications	Plan complete and presented to BCC. Work complete if approved.	
	MAJOR CAPITAL PROJECTS		
David Suchart	Juvenile Justice Center	On budget. On schedule, i.e. construction started on courts / detention complex.	
Sheriff	Jail Construction	On budget. On schedule, i.e. 45% of work completed.	

FY 96/97 COUNTY-WIDE GOALS

CHAMPION	MAJOR CAPITAL PROJECTS (cont.)	BENCHMARK ACCOMPLISHMENTS FOR 6-30-97	DONE
David Suchart	Long Term Facilities Plan Completed, Including New PSB and Annex Roof	Inventory of facilities completed. Roof contracts let for Summer 1997.	
	OTHER ISSUES		
David Suchart	Orientation & Training Core Curriculum	Developed. Implementation underway.	
Sheriff	Forest Work Camp	Agreed upon use. Incorporated into 97/98 PSCC plans.	
Rob Rockstroh	Parole and Probation Transition	Completed.	
Bill V.V./Pat Rogers	Commission on Children & Families / Healthy Start	Stabilize funding, staffing, & program. In a position to implement 97/99 biennial plan.	