

Hugo Neighborhood Association & Historical Society

P.O. Box 1318
Merlin, Oregon 97532
541-471-8271
Email: hugo@jeffnet.org
Web Page: <http://www.hugoneighborhood.org/>
PSS Archives Index #48

June 4, 2016 Letter/Email

Josephine County Budget Committee
c/o Arthur O'Hare, Finance Director
Josephine County Finance Department
500 NW 6th Street
Grants Pass, OR 97526
541-474-5255
Email: aohare@co.josephine.or.us



Subject: Share Information About Josephine County's (JO CO's) Justice System & Public Safety Services (JS&PSS) Problem/Issue (i.e., public safety issue) & Provide Public Comments On JO CO's Fiscal Policies

Dear Josephine County Budget Committee:

We contact you for the following three reasons, which are also our rationale for seeking to become informed citizen participants in JO CO's FY 2017-18 budget process.

1. *Study Design & Exploratory Committee's Study of JO CO Public Safety Issue.*
2. Josephine County Management Team: Mandated County Services/Optimal Level of Services and Exploratory Committee's Study of MALPSS.
3. May 26, 2016 News Article: *Budget Committee Member Bashes Budgeting Process.*

1. *Study Design & Public Safety Issue.* The Hugo JS&PSS Exploratory Committee (Committee) has been actively studying the public safety issue since 2013 (Appendix A). In 2015 we asked some specific PSS questions. "*What is Josephine County's Justice System & Public Safety Services Problem, . . . or Issue? First, What are the public safety services being referred to? Second, What is the issue? The third and final question, perhaps the most important question, is "Or, is there a problem, and if so, judged by what standards?"*" These three public safety questions are asked within the context of the Committee's and *Study Design's* four core values.

- Core Value #1. All Citizens, Voters, Votes, & Values Are Legitimate, Pro & Con.
Core Value #2. Fair Representation of All Values.
Core Value #3. Neutral Point of View.
Core Value #4. Public Is Decision Maker.

2. Josephine County Management Team (JOCOMT). The Committee believes that the JOCOMT's August 19, 2014 recommended strategy elements to identify mandated and elective PSS would be foundational in developing a minimally acceptable level of public safety services (MALPSS) analysis. What was heard from the JOCOMT at a March 7, 2016 meeting was that any necessary or mandated services of their organizational units were identified in their submitted budget documents, and they had not offered any supplemental documentation to the JO CO Board of County Commissioners (BCC; Appendix A).

3. May 26, 2016 Article: *Budget Committee Member Bashes Budgeting Process* (Appendix A)

- Shaun Hall. May 26, 2016. TGPDC. Budget Committee Member Bashes Budgeting Process.
- Margaret Goodwin. May 29, 2016. LTTE, TGPDC. Budgeting Policy Affects Accountability.

The cumulative effects of our three reasons prompts us to take the leap, and formally try to participate in the JO CO budget process for next year. It fits our public understanding quest of making available any process and/or product applicable to the public safety issue. Of critical importance to us are publically available vetted facts on PSS processes and standards, as we view these as opportunities for the public decision-makers, and their elected officials to make informed PSS decisions. In this case, one of our interests is to study Margaret Goodwin's (JO CO Budget Committee - JOCOBCC) statement that *"In county budgeting, the 'must haves' are the mandated services, but the level at which you fund them is also important."*

The Committee believes there are PSS levels of service (LOS) budget questions from the Oregon Revised Statutes (ORS) and Oregon Administrative Rules (OAR) about identified and inferred mandated PSS in the JO CO FY 2015-16 budget (Appendix A). A heads up is that we have come to the conclusion that there are very few ORS/OAR mandatory "LOS," and therefore, very few are identified in JO CO budgets. Perhaps we are in error. However, the majority of PSS LOS identified by the JOCOBCC and JOCOBCC in the FY 2015-16 budget appear to be "necessary," or "elective," which is not necessarily a bad thing. To help promote public trust, the budget just needs to clarify its mandated PSS and LOS better. A mandatory LOS might be the "minimally adequate level of public safety services" (MALPSS), but we are not sure as a JO CO MALPSS analysis has not been developed.

In line with the spirit of Oregon's Budget Law (Appendix B) to encourage involvement by citizens in the preparation of the budget, we wish to become citizen participants in next year's budget process. We believe there is every reason to start now as budgeting is not something you do once a year. It's a continuous operation, and it takes 12 months to complete a cycle. We want to become informed about JO CO fiscal policies (i.e., budget process), and how the JOCOBCC works, including pre-meeting topics for budget committee discussions (Appendix B). Since we have spent considerable time already studying the JO CO FY 2015-16 budget, we would appreciate any specific JO CO documents applicable to that budget. Even better would be published documents, or links to sources and references, on the JO CO Finance Department's web page.

- JO CO Finance Department Accounting Practices.
- JO CO Board of Commissioner Fiscal Policies (e.g., ordinances and/or resolutions, processes, guides, recommendations, requirements, etc.) To Organizational Units On Budget Process, Including Budget Submissions. Although helpful, we do not believe the "Budget in Brief Handbook"(s) satisfy this need.
- JO CO Board of Commissioners/JO CO Budget Committee Budgeting For Outcomes: FY 2012 - 2013(?). In the four years since the method was used, the county's priorities have not changed so there is no need to reset them (reference May 26, 2016 news article).
- Any Other Study Documents to Increase the Usefulness of Citizens' Comments (We will start studying the "Local budget law training handouts" and "Other resources" from the Oregon Department of Revenue; Appendix B).

We will definitely be promoting a citizen's guides for future JO CO PSS budgets (see May 26, 2016 letter to JOCOBCC; Appendix A). We hope it will become part of the annual budget

message from the Chair of the JOCOBCC as we believe *citizen's guides to the budget* can help citizens become informed voters on future levies.

In summary, please consider this letter as public comments to the JOCOBCC and JOCOBCC on the fiscal policies of JO CO. We recommend that the county develop a *Citizen's Guide To The Budget* for PSS as a companion to the county's budget document, and/or encourage JO CO PSS organizational units to individually develop them. Significantly, we look forward to becoming active participants in JO CO's FY 2017-18 budget process.

Sincerely,

Mike and Jon :)

Mike Walker, Chair
JS&PSS Exploratory Committee
Hugo Neighborhood Association & Historical Society
P.O. Box 1318
Merlin, Oregon 97532
541-471-8271
Email: hugo@jeffnet.org
Web Page: <http://www.hugoneighborhood.org/justicesystemexploratorycommittee.htm>



Jon Whalen, Member
JS&PSS Exploratory Committee
Hugo Neighborhood Association & Historical Society
326 NE Josephine Street
Grants Pass, Oregon 97526
541-476-1595
Email: bear46@charter.net
Web Page: <http://www.hugoneighborhood.org/justicesystemexploratorycommittee.htm>



Appendices

Appendix A. Justice System Exploratory Committee
Appendix B. Local Budget Law

Email copies:

- JO CO BCC
- JO CO Management Team, c/o Rob Brandes, Director, JO CO Public Works Department
- Margaret Goodwin, Member, JOCOBCC
- Jay Meredith, President, Securing Our Safety, Inc.
- Kevin Widdison, Editor, The Grants Pass Daily Courier
- Finance, Taxation and Exemptions Unit, Oregon Department of Revenue
- Jeanne Atkins, Oregon Secretary of State, Public Records Administrator
- Ellen F. Rosenblum, Oregon Attorney General, Oregon Department of Justice
- Senate Richard Devlin, Chair, Transparency Oregon Advisory Commission

Appendix A. Justice System Exploratory Committee

JUSTICE SYSTEM & PUBLIC SAFETY SERVICES STUDY DESIGN: 2015

Justice System Exploratory Committee
Hugo Neighborhood Association & Historical Society
<http://www.hugoneighborhood.org/justicesystemexploratorycommittee.htm>

PUBLIC SAFETY SERVICES (PSS)

Justice System Exploratory Committee
Hugo Neighborhood Association & Historical Society
<http://www.hugoneighborhood.org/pss.htm>

BUDGETS: JOSEPHINE COUNTY, OREGON

Justice System Exploratory Committee
Hugo Neighborhood Association & Historical Society
<http://www.hugoneighborhood.org/budgets.htm>

JOSEPHINE COUNTY BUDGET COMMITTEE

<http://www.co.josephine.or.us/page.asp?navid=1730>

Budget Committee. This committee is composed of three members of the public and the Board of Commissioners. The Budget Committee meets three or four times in a public setting each spring to review and approve proposed budget documents by the Budget Officer for the County. Budget Committee members should have an interest in County operations and an understanding of governmental budget processes. [Public members of the budget committee and contact information are not at JO CO's web site]

JOSEPHINE COUNTY FINANCE DEPARTMENT

<http://www.co.josephine.or.us/SectionIndex.asp?SectionID=152>

The Finance Department is responsible for the financial management and planning of the County. County management and planning includes:

- Establishing and maintaining effective controls over the County's fiscal activities.
- Coordinating the annual budget and monitoring compliance after adoption.
- Analyzing the financial condition of the County through interim and annual reports.
- Recommending fiscal policies to the Board of County Commissioners.

In addition, the Finance Department provides accurate financial information to all county departments on a monthly or as needed basis and to the general public upon request. The department is also responsible for the Accounts Payable and Payroll functions.

JOSEPHINE COUNTY MANAGEMENT TEAM

<http://www.hugoneighborhood.org/budgets.htm>

JO CO Management Team. August 19, 2014. Exhibit A. *Managers Recommendation on Strengthening County Services*. September 3, 2014 *Approved Minutes of August 19, 2014 JO CO BCC's Weekly Business Session*. Grants Pass, OR. http://www.hugoneighborhood.org/JSPSS_Studies.htm

Identify what county services are mandated by state law and what level of those services is optimal. Determine what it would cost to provide these mandated services at an appropriate and sustainable level. Identify what other county services may be desired by the citizens of the county. Determine what it would cost to provide these elective services at an appropriate and sustainable level.

JO CO Management Team Meeting With Exploratory Committee: March 7, 2016

<http://www.hugoneighborhood.org/budgets.htm>

1. January 20, 2016 Invitation to JO CO Management Team Members
2. Example Invitation Letters
 - Authur O'Hare, Finance Director, JO CO Finance Department
 - Rob Brandes, Director, JO CO Public Works Department
3. Minutes of March 7, 2016 Meeting
 - The Committee contacted the members of the Josephine County Management Team as stakeholders in defining JO CO's public safety issue, and in seeking solutions for it as JO CO Managers; they wanted to get together and brainstorm ideas. The Committee believed that the JO CO Management Team's August 19, 2014 recommended strategy elements to identify mandated and elective PSS would be foundational in developing a minimally acceptable level of public safety services (MALPSS) analysis. The Committee would be interested in any necessary or mandated services the team's work unit identified.
 - What the Committee members heard from the JO CO Management Team was that any necessary or mandated services their organizational units identified were in their submitted budget documents, and they had not offered any supplemental documentation to the JO CO Board of County Commissioners as a result of Commissioner Cheryl Walker's urging of August 19, 2014. In hindsight, the Committee feels "necessary or mandated services" were the equivalent of the JO CO Management Team's August 19, 2014 recommended strategy elements for a future committee to identify mandated public safety services.

Citizen's Guide to the Budget

Budgets: Josephine County, Oregon

<http://www.hugoneighborhood.org/budgets.htm>

One important but relatively neglected aspect of fiscal transparency is the need for the local government to explain its budget proposals and the public finances in one simple, plain language document – often referred to as a "citizens' guide to the budget." Because the annual budget is the key instrument by which a local government translates its policies into action, presenting the budget in a way that makes sense to the general public is central to government accountability.

- May 26, 2016 Letter to Josephine County Board of County Commissioners from Exploratory Committee on Citizen's Guides To The Budget.
- June 4, 2016 Letter to Josephine County Budget Committee from Exploratory Committee on Citizen's Guides To The Budget & Participating in FY 2017-18 Budget Process.

Budget News Articles & Letters-To-The-Editor (LTTE)

VII. NEWS ARTICLES & CITIZEN'S COMMENTS ON THE BUDGET

Budgets: Josephine County, Oregon

<http://www.hugoneighborhood.org/budgets.htm>

- Margaret Goodwin. May 29, 2016. LTTE, TGPDC. *Budgeting Policy Affects Accountability* (Appendix B)
- Shaun Hall. May 26, 2016. TGPDC. *Budget Commissioners OK budget that ups projected spending by 5 percent*
- Shaun Hall. April 20, 2016. TGPDC. 'Status quo' budget proposed for coming year
- Shaun Hall. April 7, 2016. TGPDC. *Road \$\$\$ Won't be going to Sheriff's Office - Yet*
- Sandi Cassanelli. April 29, 2016. LTTE, TGPDC. *County doesn't allow enough time to see budget.*
- Jim Moore. June 18, 2015. TGPDC. *County approves budget; road funds won't go to sheriff*
- Jim Moore. June 16, 2015. TGPDC. *Commissioners to consider total county budget*
- Jim Moore. June 6, 2015. TGPDC. *County could transfer road money to the sheriff, but the issue is complicated*
- Jim Moore. May 8, 2015. TGPDC. *Justice officials outline fiscal cuts*

- Jim Moore. March 27, 2015. TGPDC. *Bill containing county payments sits in Senate*
- Melissa McRobbie. March 15, 2015. TGPDC. *Budget cuts hurting domestic violence victims*
- Melissa McRobbie. January 7, 2015. TGPDC. *County's new finance director braces for challenges.*
- Jim Moore. June 19, 2014. TGPDC. *Commissioners discuss budget*
- Jim Moore. June 15, 2014. TGPDC. *Animal levy adds \$500,000 to county budget*
- Melissa McRobbie. May 23, 2014. TGPDC. *Local funding request to boost rural patrols turned down*
- Jim Moore. May 16, 2014. TGPDC. *Public safety maintains budget*
- Jim Moore. May 9, 2014. TGPDC. *County's proposed budget looks to maintain status quo*
- Stacy D. Stumbo. June 20, 2013. TGPDC. *JoCo budget is \$68 million for 2013-14*
- Stacy D. Stumbo. June 13, 2013. TGPDC. *County budget likely to include more cuts*
- Stacy D. Stumbo. May 29, 2013. TGPDC. *JoCo Budget Committee OKs 2013-14 spending plan*
- Stacy D. Stumbo. May 26, 2013. TGPDC. *Glaring Fiscal Woes for Josephine County*
- Stacy D. Stumbo. May 15, 2013. TGPDC. *Criminal Justice Officials Tell Budget Committee Services Are Threatened*
- Stacy D. Stumbo. May 8, 2013. TGPDC. *Deeper Cuts in county service projected*
- No Identified Author. May 16, 2012. TGPDC. *Budget-building, layoffs, jail releases ahead*
- Shaun Hall. November 5, 2008. TGPDC. *Voters reject public safety measures*

MALPASS - MINIMALLY ACCEPTABLE LEVEL OF PUBIC SAFETY SERVICES

Justice System Exploratory Committee

Hugo Neighborhood Association & Historical Society

<http://www.hugoneighborhood.org/malpass.htm>

Appendix 4B. Josephine County's Minimally Adequate Level of Public Safety Services Standards

- Walker, Mike; Whalen, Jon, Members JS&PSS Exploratory Committee, Hugo Neighborhood Association & Historical Society. Very Draft December 15, 2015. *Appendix 4B. JO CO's Minimally Adequate Level of Public Safety Services (MALPASS) Standards, Including Law Enforcement Staffing & Deployment.* Supporting Justice System & Public Safety Services Study Design: 2015. Hugo, OR.

Standards For Public Safety Services

- Walker, Mike; Whalen, Jon, Members JS&PSS Exploratory Committee, Hugo Neighborhood Association & Historical Society. Very Draft February 1, 2015. *Standards For Public Safety Services.* Element of Appendix D2. Conditions, Indicators & Standards. Supporting Justice System & Public Safety Services Study Design: 2015. Hugo, OR.

GUEST OPINIONS

Justice System Exploratory Committee

Hugo Neighborhood Association & Historical Society

- Walker, Mike, Hugo JS&PSS Exploratory Committee, HNA&HS. March 27, 2016. *Analysis needed for budget solution*, Guest Opinion. *The Grants Pass Daily Courier*. Grants Pass, OR.
http://www.hugoneighborhood.org/JSPSS_Guest_Opinions.htm
- Whalen, Jon, Hugo JS&PSS Exploratory Committee, HNA&HS. March 8, 2016. *A search for public safety answers*, Guest Opinion. *The Grants Pass Daily Courier*. Grants Pass, OR.
http://www.hugoneighborhood.org/JSPSS_Guest_Opinions.htm
- Hugo JS&PSS Exploratory Committee, HNA&HS. January 18, 2016. *Public Safety Study Design Idea*. Guest Opinion Submitted to Kevin Widdison, Editor, *The Grants Pass Daily Courier*. Grants Pass, OR.
http://www.hugoneighborhood.org/JSPSS_Guest_Opinions.htm
- Meredith, Jay. February 2, 2016. *Public safety round table recommended*, Guest Opinion. *The Grants Pass Daily Courier*. Grants Pass, OR.
http://www.hugoneighborhood.org/JSPSS_Guest_Opinions.htm

Appendix B. Local Budget Law

Local Budget Law

Oregon Department of Revenue

<https://www.oregon.gov/DOR/programs/property/Pages/local-budget.aspx>

Finance, Taxation and Exemptions Unit

Oregon Department of Revenue (ODR)

P.O. Box 14380

Salem OR 97309-5075

Email: finance.taxation@oregon.gov

General Assistance

503-378-4988 or 1-800-356-4222

Most local governments in Oregon must prepare and adopt an annual or biennial budget. Schools, counties, cities, rural fire protections districts, and special districts are subject to budget law. Read our "Citizen overview of local budget law" for more information.

Download forms, publications, and budget detail sheets by searching "local budget" in our forms center. Budgets must be prepared in a format prescribed by statute.

Local budget law training handouts (TH)

TH1 Training PowerPoint.

TH2 Sample budget (Office document - go to ODR web page).

TH3 Statutory references.

TH4 Budget committee and pre-meetings.

TH5 Changes after adoption.

TH6 Glossary.

TH7 Property tax worksheet (Office document - go to ODR web page).

Other resources (OR)

OR1 The Local Budgeting Manual, 150-504-420.

OR2 Local Budgeting in Oregon, 150-504-400

OR3 Administrative rules, see chapters 294 and 310.

- Oregon Administrative Rules (OAR): Division 294, Local Budget (http://arcweb.sos.state.or.us/pages/rules/oars_100/oar_150/150_294.html).
- Oregon Administrative Rules (OAR): Division 310, Levy of Property Tax; Tax Reduction Programs (http://arcweb.sos.state.or.us/pages/rules/oars_100/oar_150/150_310.html).
- Oregon Revised Statutes (ORS) 294, Chapter 294. County and Municipal Financial Administration (<http://www.oregonlaws.org/ors/chapter/294>).
- Oregon Revised Statutes (ORS) 310, Chapter 310. Property Tax Rates and Amounts; Tax Limitations; Tax Reduction Programs (<http://www.oregonlaws.org/ors/chapter/310>).

Pre-meeting Topics for Budget Committee Discussions

Local Budget Law

Oregon Department of Revenue

<https://www.oregon.gov/DOR/programs/property/Documents/local-buget-budget-committee-pre-meeting.pdf>

We are sometimes asked whether the budget committee can be called together for “preliminary” discussions prior to their first “official” meeting under ORS 294.426 at which the budget message is delivered and for which notice must be published.

Following is a list of the types or topics of discussion that can be conducted prior to that first official meeting:

- Training on the budget committee process, calendar, expectations for committee members, etc.
- Committee members’ preferences for ground rules, rules of order, conduct of meetings, voting/reaching consensus, fact finding process, etc.
- Orientation on the organization and its various departments, programs, staffing, etc., and on the activities or services provided by each.
- Orientation on the budget document, the fund structure and the types of activities or programs and expenditures made from each fund in the budget.
- General discussion of vision and goals, spending priorities, or philosophy on how to allocate scarce resources or make trade-off decisions as to which programs get funded and which don’t.
- General economic projections by the finance officer of possible changes in resources or requirements expected next year.
- Any and all discussion of the current year budget or prior year budgets, including what, in general, might be done differently next year.

What cannot be discussed before the formally “noticed” meeting?

ORS 294.426(6): “The budget committee may not deliberate on the budget document as a body before the first meeting.” So, we recommend that you do not talk about:

- Specific estimates or appropriation amounts associated with any fund or line item, resource or requirement.
- The question of whether to fund specific programs or expenditures.
- The question of whether to impose any tax levy, or the amount of any levy