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SETTING PROFICIENCY STANDARDS

**PROCEDURES BEING USED BY THE OREGON BUSINESS AND
MANAGEMENT CERTIFICATE OF ADVANCED MASTERY
CURRICULUM DEVELOPMENT PROJECT**

A First Interim Report

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**Setting Proficiency Standards
Procedures Being Used by the Oregon Business and Management
Certificate of Advanced Mastery Curriculum Development Project**

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**Setting Proficiency Standards
Procedures Being Used by the Oregon Business and Management
Certificate of Advanced Mastery Curriculum Development Project**

Abstract

This focus of this first interim report is on *the process* of setting proficiency standards for skills needed to successfully matriculate to postsecondary education and/or enter and pursue careers in the business and management field. The process model is easily replicable for applications in other career areas, particularly those identified by the Certificate of Advanced Mastery (CAM) secondary school endorsement areas, which have been developed to meet the requirements of Oregon House Bill 3565, the Educational Act for the Twenty-first Century.

The process model includes seven basic steps:

- Selecting initial competencies;
- Selecting advisory groups;
- Modifying, adding and rejecting competencies using the Delphi Method;
- Developing general proficiency statements;
- Defining levels and criteria;
- Finalizing proficiency standards; and
- Periodically updating standards to reflect changing conditions and technologies.

The *selection of initial competencies* requires a literature search and review of available educational, professional and industry-based documents acquired from local, state, national and international sources. This breadth of sources guards against undue provincialism by not only using local or state sources, but gaining the wider perspective of national and international studies. In this project, documents were reviewed, scanned and sorted, eliminating those prior to 1990 and not germane to the four approved statewide program areas of accounting, marketing, office systems and hospitality, tourism and recreation (HTR). Items were selected under broad areas for each of the four programs, then condensed and written into statements that were consistent in form (e.g., active voice such as demonstrate, discuss, utilize, or apply a competency.)

The *selection of advisory groups* requires the establishment of *criteria* which represent major participants: educators, employers, government, and agencies or associations. These in turn represent population centers and diverse locations throughout the State. In this project, members were selected for two advisory groups: a *design team* made up of educators from public secondary and postsecondary schools, and a *steering committee* composed of business, industry, government and agency or association representatives. Selection reflected location, size of institution and position within the institution.

Modifying standards requires an iterative process of polling the expert representatives selected for the advisory committees regarding acceptance, rejection or modification of the

initial proficiency standards, or new additions. This *Delphi Method* relies upon an established but diverse and representative group of knowledgeable persons, or “experts,” to come to consensus by several “rounds” of polling, with second or third rounds accepting, rejecting or modifying additions or modifications of items.

Developing general proficiency statements requires that competencies arrived at through the Delphi method be condensed to reduce redundancy, rephrased to meet standard forms, or augmented to address all other accepted general proficiencies required of the Certificate of Initial Mastery (CIM), entrance into specific jobs or postsecondary institutions, or other reporting obligation. Consensus regarding these changes will require additional Delphi polling of the same advisory committee members.

Defining levels and criteria sets guidelines for the assessment and recording of student progress in attaining standards.

Finalizing proficiency standards will require the alignment of standards for the Business and Management CAM with all CAM areas, utilizing a common format and common terms for assessment levels.

Periodically updating standards has become an obvious need recognized from early results of the Delphi process, where modifications and additions to initial standards reflect the changing socio-economic climate and advancing technologies. The Delphi method can again be employed to reach consensus among experts, with advisory committee membership changing over time. This last aspect of the model will be essential to continuing state-of-the-art proficiency standards for career preparation, entry and further education.

As talented and dedicated groups across Oregon grapple with the setting of required proficiency standards for the six CAMs, those working on the Business and Management CAM Curriculum Development Project would like to offer this successful working model. There is a need to document process and the results of process, in order to make timely decisions regarding standards a manageable and ongoing effort over time.

**Setting Proficiency Standards
Procedures Being Used by the Oregon Business and Management
Certificate of Advanced Mastery Curriculum Development Project**

Introduction

Oregon's *Education Act for the Twenty-first Century* (HB 3565) challenged the State's business/industry, civic and education leaders to examine what proficiencies are essential to the successful development of local enterprises and an increasingly global economy. The organization of what was secondary education, with a diploma for satisfactory completion of required courses and credits, was thus divided into two levels of proficiency: the Certificate of Initial Mastery (CIM) and the Certificate of Advanced Mastery (CAM). The CIM basically covers required academic, entry vocational and citizenship skills, while the CAM prepares students for initial career entry or the further postsecondary education necessary to prepare students for professional/technical careers and leadership roles. Achievement of the CIM is designed to correspond to the completion of the tenth grade, while the CAM would parallel high school completion of the eleventh and twelfth grades. Actual achievement, however, depends on the mastery of proficiency standards, demonstrated through a body of work such as a portfolio, so that students are able to earn a CIM and CAM earlier or later than the tenth and twelfth grades.

The CAM is organized around six endorsement areas: Arts and Communications, Business and Management, Health Services, Human Resources, Industrial and Engineering Systems and Natural Resource Systems. Academic skills are integrated and applied within each area. Oregon's Senate Bill 81 created statewide CAM Curricular Development Projects for each endorsement area. Vickie Schray, Director of Professional Technical Education at Mt. Hood Community College, is the Project Director for the Business and Management Curricular Development Project. Her diagram of the CAM's conceptual framework is reproduced on the following page.

This first interim report presents and discusses the model used in this project for setting proficiency standards, the first task of CAM Curricular Development Projects. Its purpose is to document the process both as part of the project and for use by others. Its value can be the establishment of a systematic approach to the setting, refining and updating of proficiency standards across CAM areas and for specific professional technical programs within CAM areas. The model can be utilized at national, state, regional and local levels.

This report will discuss the model in the following sections:

- Selecting Initial Competencies
- Selecting Advisory Groups
- Modifying, Adding and Rejecting Competencies Using the Delphi Method
- Developing General Proficiency Statements
- Defining Proficiency Levels and Criteria
- Conclusions

CERTIFICATE OF ADVANCED MASTERY CONCEPTUAL FRAMEWORK

LIFE LONG LEARNING

4 Year College

Community College

Workplace

On-The-Job Training/
Apprenticeship

Bridge

CERTIFICATE OF ADVANCED MASTERY

ENDORSEMENT AREA(S) OF STUDY

Proficiency Standards

- Academic Knowledge
- Technical Skills
- Work Behaviors

AREAS OF EMPHASIS

- Competencies

FOUNDATION SKILLS

- Think
- Self Direct Learning
- Communicate
- Use Technology
- Quantify
- Collaborate

LIFE ROLES

- Individual
- Learner
- Producer
- Citizen
- Consumer
- Family Member

ADVANCED APPLICATIONS

- Create & Use of Knowledge
- Improve Processes
- Enhance the Performance of Systems

CERTIFICATE OF INITIAL MASTERY

FOUNDATION SKILLS

- Think
- Self Direct Learning
- Communicate
- Use Technology
- Quantify
- Collaborate

APPLICATIONS FOR LIVING

- Deliberate on Public Issues
- Understand Diversity
- Interpret Human Experience
- Apply Science & Math
- Positive Health Habits

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Selecting Initial Competencies

The selection of competencies for all CAMs and for those basic to all Business and Management professional/technical programs relied on work done previously and will need to be modified for consistency when the Business and Management CAM and all other CAMs have established proficiency standards. Initial core CAM competencies were developed by Sam Pambrun of the Umatilla Education Service District in Pendleton, and core Business and Management competencies were largely those identified by the Office Systems Department at Clatsop Community College.

Initial competencies for the four Business and Management programs, which include Accounting, Marketing, Office Systems and Hospitality, Tourism and Recreation (HTR), were developed by Schray using a broad array of sources. These competencies would be critical to curriculum development and would in turn influence the broader all-CAM and Business and Management CAM proficiency standards.

The literature search had several objectives. One was to locate recent, *industry-based* sources for competencies. Another was to look at work done at *different levels and situations*: national and international sources; local and state sources; large and small businesses; urban and rural environments. A third was to identify *commonalities* across sources and reduce redundancy. In this way, competencies could be selected that were inclusive and broadly applicable to varying industrial settings at current stages of technical implementation.

The initial research produced a large number of documents which were first sorted to limit results to the four program areas and to those produced recently (1990 or later). Contacts were made with major sources to further explore work in progress, rationale, processes and additional sources. Documents were selected and then scanned into a data file by a commercial firm. *The Reference section includes selected documents and resources.* The data file was analyzed and organized by topics within each program area. Initial statements of competencies were then created within the topics for each program.

The advantage of this approach has been in the realization of the objectives for the literature search: current industry-based, broadly applicable competencies. In addition, contacts with sources continuing to do work on the setting and evaluation of competencies has introduced an ongoing dialogue with Schray, offering potential for future applications and improvements.

This initial selection of competencies must have sufficient rigor, through systematic document analysis, to identify those skills required for successful career entry and advancement in each program area. It is the *first step* in the model for selecting proficiency standards, but an important one.

The *second step* is a much different component that is also critical: the selection of advisory groups, discussed in the following section.

Selecting Advisory Groups

Advisory groups for the Business and Management CAM Curricular Development Project include a Design Team made up of educators from public schools and community colleges, and a Steering Committee representing industry, education, government and related associations and agencies.

Objectives for the selection of advisory group members were to reflect the geography and scope of Oregon education and work sites in the four Business and Management program areas, to represent diversity in the positions and demographic characteristics of participants, and to attract persons knowledgeable and experienced in their fields who were willing to commit time and effort to the project. In effect, the intent of the selection was to create a *panel of experts* on the educational proficiencies required of CAM recipients to succeed in the four program areas and related career fields.

Geographic locations represented by members were primarily from the more populous valley region, at 69% for the Design Team and 100% for the Steering Committee. This difference reflects the Design Team's educational representation from throughout the State, and the emphasis on industry representation on the Steering Committee, with heavy concentration of firms and associations in the valley. Twenty-four percent of Steering Committee members were from organizations functioning statewide. Eleven percent of Design Team members represented coastal locations and 19% inland locations. Of these locations, small towns were represented by 44% of Design Team members while 73% of Steering Committee members were from the urban areas of Portland, Salem, Eugene or Vancouver. Urban locations were represented by 22% of Design Team members, while suburban sites were 25% and rural areas 8%. Among Steering Committee members, 22% were from suburban areas and 5% from small towns.

Types of positions, professions and organizations also varied between the Design Team and Steering Committee. Design Team members were primarily instructors (including some with departmental responsibilities), at 94%, while most Steering Committee members were in management positions, at 54%, with 27% in staff, 14% in instructional and 5% in specialist positions. Disciplines represented by members of the Design Team included the four program areas and a general business category, with some members representing more than one subject, and one or two representatives each in math, industrial technology and interdisciplinary instruction. The largest single area was the general business category, at 33%, followed by HTR (20%) and office occupations (18%); accounting and marketing were both at 9%. The largest career field represented by the Steering Committee was employment, recruitment and training, at 26%, followed by business, at 24%. The four program fields, retail, interdisciplinary and academic instruction were represented by from 2% to 9% each; another 11% were in an "other" category. The types of school organizations represented on the Design Team were mainly high schools, at 54%, and community colleges, at 40%; a middle school and an occupational skill center were also represented. Types of organizations represented on the Steering Committee were 43% firms or businesses, 27% educational institutions (with one representative from the University of Oregon), 16% business associations and 14% government agencies. *Table 1, beginning on the opposite page, details selected characteristics of both advisory groups.*

Table 1. Advisory Group Characteristics

Characteristics	Design Team	Steering Committee	Total
Geography:	<i>N</i> = 36	<i>N</i> = 37	<i>N</i> = 73
Urban ¹	22.2%	73.0%	47.9%
Suburban	25.0	21.6	23.3
Small town	44.4	5.4	24.7
Rural	8.3	0.0	4.1
Coast	11.1	0.0	5.5
Valley	69.4	100.0	84.9
Inland	19.4	0.0	9.6
Position:	<i>N</i> = 36	<i>N</i> = 37	<i>N</i> = 73
Management	2.8%	54.1%	28.8%
Instruction	94.4	13.5	53.4
Staff	0.0	27.0	13.7
Specialist	2.8	5.4	4.1
Field: ²	<i>N</i> = 45	<i>N</i> = 46	<i>N</i> = 91
Business	33.3%	23.9%	29.7%
Accounting	6.7	6.5	6.6
Marketing	8.9	8.7	7.7
Office Systems	17.8	2.2	9.9
Hospital/Tourism/Rec	20.0	8.7	14.3
Academic	4.4	4.3	4.4
Recruitment/Employment	0.0	26.1	13.2
Retail	0.0	8.7	4.4
Other	8.9	10.9	9.9
Type of Organization:	<i>N</i> = 36	<i>N</i> = 37	<i>N</i> = 73
Education	97.2%	27.0%	61.6%
Government	2.8	13.5	8.2
Firm/business	0.0	43.2	21.9
Agency/Association	0.0	16.2	8.2
Level of Education Institution:	<i>N</i> = 35	<i>N</i> = 10	<i>N</i> = 45
Middle School	2.9%	0.0%	2.2%
High School	54.3	30.0	48.9
Community College	40.0	50.0	42.2
University	0.0	10.0	2.2
Occupational Skills Center	2.9	10.0	4.4
Size of Organization: ³	<i>N</i> = 30	<i>N</i> = 19	<i>N</i> = 49
Fewer than 50 students/staff	0.0%	23.8%	9.6%
50 - 99	0.0	9.5	3.8
100-199	0.0	4.8	1.9
200-499	16.1	9.5	13.5
500 or more	83.9	52.4	71.2

¹Urban included Portland, Vancouver, Salem and Eugene.

²Some members represented more than one field.

³Telephone survey of members, with 86% of Design Team and 57% of Steering Committee members responding.

Table 1. Advisory Group Characteristics, Continued

Characteristics	Design Team	Steering Committee	Total
Survey Respondents	<i>N</i> = 31	<i>N</i> = 21	<i>N</i> = 52
Years Experience in Field:			
Fewer than 4 years	0.0%	4.8%	1.9%
5 - 10 Years	16.1	14.3	15.4
More than 10 years	83.9	81.0	82.7
Age:			
Less than 45 years old	45.2%	23.8%	36.5%
45 years old or more	54.8	76.2	63.5
Gender:			
Male	32.3%	52.4%	40.4%
Female	67.7	47.6	59.6
Ethnicity:			
Asian	3.2%	0.0%	1.9%
African American	3.2	4.8	3.8
Hispanic	0.0	4.8	1.9
Caucasian	93.5	90.5	92.3
Highest Educational Level			
Some college or AA	3.2%	9.5%	5.8%
Bachelor's degree	16.1	42.9	26.9
Master's degree or higher	80.7	47.6	67.3

A telephone survey was conducted to determine additional information about members, including the size of the organization represented, years experience in the field, age, sex, ethnicity and education. Preliminary results show that the size of most organizations is more than 500 staff, students or members, at 84% for the Design Team and 52% for the Steering Committee. Years of experience were most often more than ten years, at 84% for the Design Team and 81% for the Steering Committee. With such extensive experience, the age of members was predictably mature, with 55% of the Design Team and 76% of the Steering Committee 45 years of age or more, and with no one on either advisory group under 25 years of age. Females were 68% of the Design team and 48% of the Steering Committee; 94% of the Design Team and 91% of the Steering Committee were white or Caucasian. A master's degree or higher was the most common educational level for Design Team members, at 81%, while a bachelor's degree was 43% and a master's or higher 48% of the Steering Committee.

Not apparent in the statistics on the characteristics and representation of advisory committee members were several other factors. One is the scope and significance of representation, such as the Oregon Employment Department, the State Retail Association, the Oregon Business Council, the Private Industry Council and the Northwest Labor

Council. Another is multiple representation, in which one member represents a type of organization as well as a position, discipline or field. Members from Fred Meyer, for example, represent a large retail business with outlets throughout the State, but also recruitment and employment, with both management and staff positions represented. Several members may be from the same institution but in different roles and positions, affording an opportunity for more frequent and ongoing discussion and clarification.

The criterion that members be able and willing to commit time and energy to the Project is also critical to the process model for setting proficiency standards. The modification and addition of standards requires reaching consensus at several stages in the process, with each stage increasingly concise and refined. As members utilize their individual expertise and learn from the expertise of other members, their common experience contributes to the range, utility and demonstrability of standards selected.

The stability of the advisory groups is also important to the process used to modify and add standards using the Delphi method, as the following section will demonstrate.

Modifying, Adding and Rejecting Competencies Using the Delphi Method

The Delphi Method. The Rand Corporation originated the concept in the 1970s with a process used in the "Delphi Project" which was designed to gather opinion and to reach consensus regarding military strategy from a group of experts. The process involved a series of questionnaires with a feedback mechanism which reflected the group's responses. It has been used extensively since for evaluating, planning, prioritizing, forecasting and other decision processes which require judgment and agreement as well as factual data. The process is as much art as science.

Linstone and Turoff, editors of the classic text, *The Delphi Method, Techniques and Applications*, describe the process as follows:

Delphi may be characterized as a method for structuring a group communication process so that the process is effective in allowing a group of individuals, as a whole, to deal with a complex problem.¹

There are a number of factors to be considered in the process, such as:

- Questions or issues to be addressed;
- The selection or identification of the advisory group of experts;
- The structure of the communication process; and
- Analyses and utilization of results.

1. Linstone and Turoff, page 3.

In this project, questions and issues have clearly been the setting of proficiency standards for the Business and Management CAM. Objectives for the initial setting of competencies and selection of advisory groups have been discussed. The structure of the communication process has been handled by Fancher and Associates, in consultation with Project Director Schray. The Director and consultants act as the "*monitor team*," to use classic Delphi terminology, translating competencies from existing sources into a communication structure that facilitates advisory group response to statements of competency by retaining, modifying, rejecting or adding to them.

The Fancher application of the Delphi Method included the following steps:

1. Preparation of questionnaires with statements of competencies and the response alternatives *retain, modify, reject or add*.
2. Three *levels* of questionnaires were prepared. *Level I* included core competencies for all CAMs, developed from work done for the Natural Resources CAM by Sam Pambrun of the Umatilla Education Service District in Pendleton. *Level II* listed competencies for all programs in the Business and Management CAM and utilized items originated by the Office Systems Department at Clatsop Community College in Astoria. *Level III* presented competencies for each of the four programs in the Business and Management CAM: accounting, marketing, office systems and HTR. These competencies were primarily drawn from the literature search and analysis done by Schray; HTR statements also incorporated competencies developed by the statewide HTR Curriculum Design Team.
3. For each level, at least two *rounds* were administered. In the second round, items from the first round were kept that received 80% of the response option to retain. If modifications were indicated, they were listed with the original statement and voted upon. Items rejected or added were rated using a four-point Likert scale with 4 strong and 1 weak. Those statements averaging 3 or better were retained.

Sample pages of Level I and II, Rounds 1 and 2 are given in the Appendices. Note the consistency of language in the statements, with verb forms such as demonstrate, discuss, present, prepare. Rounds were administered at advisory group meetings and follow-up was conducted in case of absences or if responses were incomplete.

Two rounds of Levels I and II have been completed by the Design Team and tabulated. Two rounds of Level III have been administered. Follow-up is continuing to insure valid responses from all advisory group members.

The results of the completed Levels I and II Design Team responses demonstrate the process of consensus building and the capacity for updating and refining statements. Changes typically reflect new workplace requirements such as health and safety, an increasing international perspective and new technologies. An example of the latter would

be the rejection of typing skills but addition of word processing skills. *Table 2 below and on the following page shows the number of items retained, modified, added or rejected for each of the Level I and II categories.*

Table 2. Round Two Changes in Level I and II Competencies

Categories	Retain	Modify	Add	Total Accept	Reject
Level I					
Communication Skills					
Listening	4	0	0	4	0
Speaking	7	2	1	10	0
Reading	2	2	0	4	0
Writing	6	0	8	14	0
Transfer information	4	1	4	9	0
Occupational Safety/Health	12	4	7	23	0
Problem Solving	6	0	7	13	0
Teamwork & Human Relations	10	0	4	14	0
Mathematics Skills	15	0	1	16	7
Career Development	5	1	10	16	0
Research Methodology	2	2	1	5	0
Computer Skills	5	1	12	18	1
Economic Principles	10	2	5	17	2
Subtotal, Level I	88	15	60	163	10
Percent	51	9	35	4	6
Level II					
Banking/Bookkeeping					
Bookkeeping	7	0	1	8	0
Banking	3	0	2	5	0
Process Information					
Keyboarding	4	0	2	6	1
Information processing	2	0	1	3	0
Produce business documents	5	2	1	8	1
Correct copy	1	0	4	5	4
Compose on keyboard	3	1	3	7	0
Maintain equipment	0	3	7	10	2
Duplicate/photocopy	4	2	0	6	0
Word/data processing	8	2	10	20	5

Table 2. Round Two Changes in Level I and II Competencies, Continued

Categories	Retain	Modify	Add	Total Accept	Reject
Perform Office Procedures					
Telephone skills	4	0	3	7	0
Telecommunications	0	5	2	7	1
Records storage & retrieval	2	2	1	5	0
Manual/electronic file mgt.	7	1	0	8	1
Establish filing systems	0	1	0	1	2
Records management system	2	0	0	2	3
Perform in an Office Environ.					
Identify requirements	3	3	9	15	0
Maintain work station	0	1	1	2	0
Arrange work schedule	2	0	3	5	4
Work safely in an office	4	1	2	7	0
Subtotal, Level II	61	24	52	137	24
Percent	38	15	32	85	15
Total, Levels I & II	149	39	112	300	34
Percent	45	12	33	90	10

The Table shows greater acceptance of Level I standards, basic to all CAMs, than for Level II standards, basic to the Business and Management CAM. In Level I, 51% were retained as written and just 6% were rejected, compared to 38% retained and 15% rejected for Level II. Fewer statements were modified but more were added in Level I than in Level II. In both Levels, however, the largest share of responses was for retention, indicating considerable agreement with original statements. Modifications and additions were most common in emerging areas, such as computer skills and career development in Level I, and word/data processing in Level II. The greater number of changes and rejections in Level II suggests that the expertise of the Design Team in business-related core standards was utilized through the Delphi process.

The apparent success of the Delphi process as demonstrated by these early results can be attributed to the careful initial selection and wording of competency statements, the selection of experts as advisory group members, and the effective design and administration of the questionnaire. Further steps beyond the completion of Levels I, II and III rounds by both advisory groups include the integration of Level I standards with other CAMs, the editing of Level II and III results to insure completeness and minimize redundancy, and the alignment of standards with the CIM and the Proficiency-based Admission Standards

System (PASS). developed by the Oregon State System of Higher Education. One or two additional rounds may be necessary.

Developing General Proficiency Statements

As results from the Delphi processes identifying competencies began to emerge, it became clear that some broad, integrated statements of general proficiencies in Business and Management applications needed to be developed. These statements would span across the four specific program areas and include basic skills and core competencies. Some draft statements were prepared by Design Team members during work sessions which were part of the November 29th meeting.

Using these draft statements, Second Round Delphi results, CIM documents and other sources of competency statements not used in the Delphi process, Conrath prepared general proficiency statements in ten areas (see Appendix 5). The ten areas included the ability of students to:

- Understand and apply economic principles;
- Implement standard business practices and procedures;
- Develop business career potential;
- Communicate effectively in a business environment;
- Manage business records and documents efficiently;
- Analyze and interpret business trends and operations;
- Promote products and services convincingly;
- Collaborate for business problem solving and strategic planning;
- Utilize time, personnel and material resources pragmatically; and
- Understand and comply with legal, health and safety requirements.

A single, comprehensive sentence was used to characterize each proficiency area, followed by up to ten specific items for which students would demonstrate skill and understanding. The draft was submitted to the joint meeting of the Design Team and Steering Committee December 14th, and feedback solicited.

While continuing to receive comments before revising the statements, several issues have surfaced from discussions. One is whether technology should be imbedded in the areas or broken out separately. Another issue is whether basic and core competencies are adequately identified in the statements and specific items. Finally, establishing levels of and criteria for proficiencies need to be added to the statements; that is the subject of the following section.

Defining Proficiency Levels and Criteria

Assessment was a major topic at the January 9th meeting of the Design Team. Given proficiency standards, what will constitute criteria for mastery and at what level? What framework should be advocated for ongoing student evaluation and follow up?

In general, CAM area proficiencies build on those acquired by students meeting CIM standards and should advance those skills and understandings to the point that students will be able to successfully enter and advance in a career field or matriculate to a postsecondary technical school, college or university. This means that the CAM set of proficiencies must reflect the standards of business, industry and professional/technical schools at the entry level, *with the potential for successful advancement and leadership*. Levels must include recognition of the kind of excellence associated with honors programs and college-bound curricula, and performance below the *standards*, expected to be higher than the current high school graduation requirements because of CIM and educational reform processes, will not be considered sufficient for receipt of the CAM. While levels and their terminology will eventually be uniform for all CAMs, the levels agreed upon by the majority of Design Team members were:

Exemplary performance;
Quality performance; and
In progress.

Using a couple of handouts as models (*see Olson and Marshfield High School in the Reference section*), Design Team members hammered out draft definitions for these levels that will be reviewed and revised. The discussion clearly endorsed the meaning of CAM achievement described above, emphasizing high achievement and the unacceptability of performance below standard.

Initial criteria statements are being developed by Conrath for each of the ten general proficiency statements, and will be circulated for review.

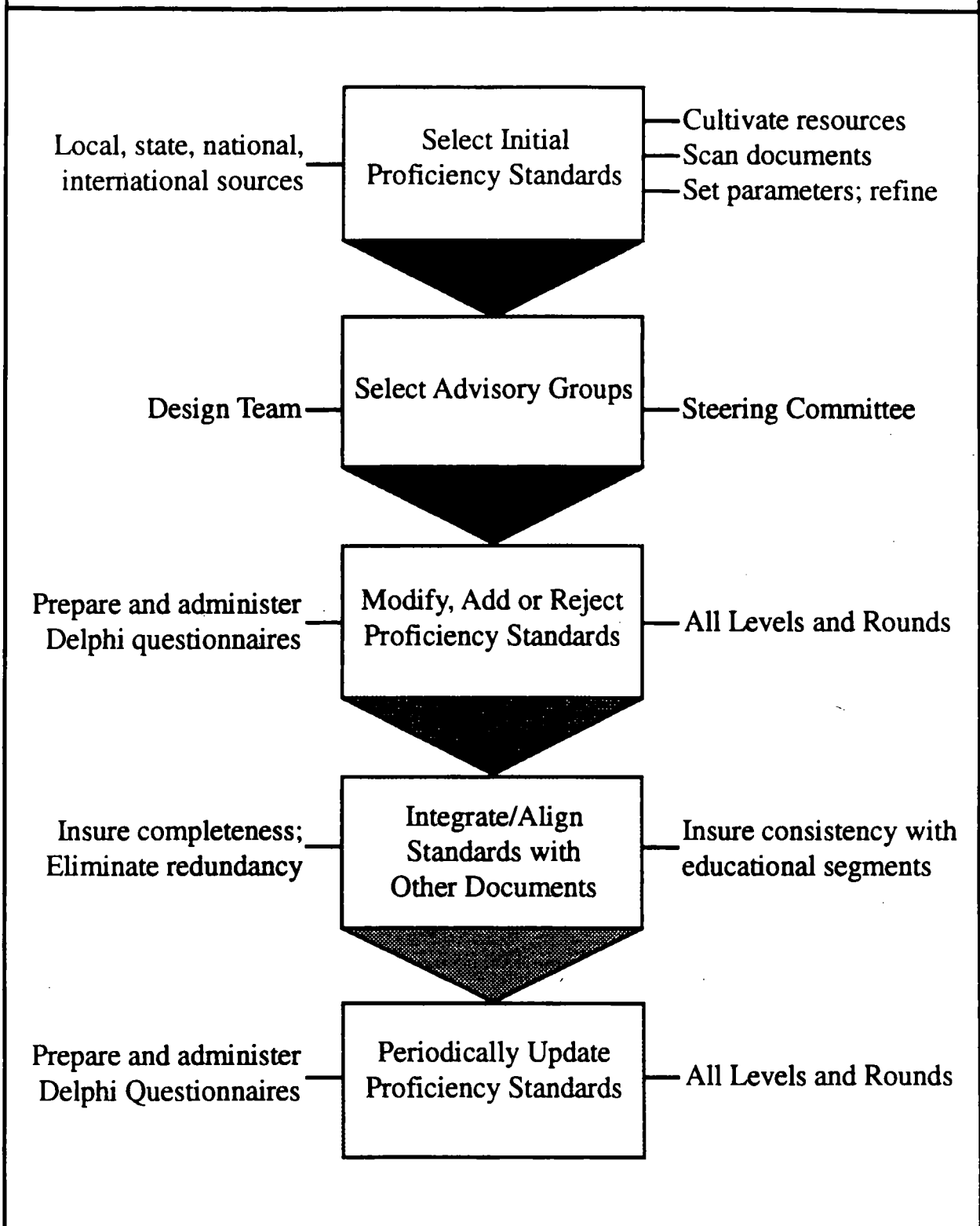
While discussion of a student performance reporting format was limited at the January meeting, several points of consensus emerged. One was that the development of a format by the Curriculum Project should constitute a framework that individual schools or districts could tailor to their own needs. Another was that the format be simple, with areas that could be checked off as well as areas for comment by instructional team members. Still another point was that reporting should specify each general proficiency area separately (criteria will need to be adjusted for the reporting period covered). Schray is selecting materials that Conrath will use in drafting a sample format.

Development of this assessment phase will further clarify and influence the final form of the proficiency standards for the Business and Management CAM.

An additional step essential to maintaining the applicability of standards is the periodic updating of them through additional Delphi questionnaires administered to similar advisory groups. Revisions no less often than every five years will be requisite to keeping proficiency standards current with changing conditions and technologies.

The diagram on the opposite page illustrates the model for setting proficiency standards. While all steps have not yet been completed nor final results reported, the model can be helpful to others deliberating on the setting and measuring of educational outcomes.

Setting Proficiency Standards Flow Chart



Conclusions

This first interim report has emphasized the *process* used in setting proficiency standards for the Business and Management CAM endorsement area. Preliminary results indicate that the process has been successful in systematically and efficiently modifying, adding or rejecting initial competencies. Refining the material to workable statements that can be easily understood and practically applied in local schools, and which lead to processes which actualize the goals of educational reform, will require further work with the field. This report has been prepared to familiarize others with the process and to assist those working on the setting of standards which need to represent consensus among constituent groups.

The Statewide CAM Curriculum Development Project will be moving ahead rapidly in the next few months. As all six CAM areas finalize their standards, further synthesis and revision will be necessary in order to provide comprehensive, consistent standards and processes among them. The Delphi and other feedback methods using experienced, committed advisory committee members and other experts from the field will be valuable in reaching agreement on a very significant educational reform document.

It will be necessary to produce a first document without the instructional structure in place with which to implement proficiency-based, collaborative and career-oriented education. It will be important to assess results and revise standards as schools gain experience. This will continue to be an iterative process much as the Delphi: *"Is this now true, practical, useable?"* And getting consensus from the experts.

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Appendices

- Appendix 1. Sample Page, Level I, Round 1
- Appendix 2. Sample Page, Level I, Round 2
- Appendix 3. Sample Page, Level II, Round 1
- Appendix 4. Sample Page, Level II, Round 2
- Appendix 5. General Proficiency Statements,
Business and Management CAM
- Appendix 6. Design Team and Steering Committee

Appendix 1. Sample Page, Level I, Round 1

PROFICIENCY STATEMENT	RETAIN	REJECT/ MODIFY
1.5 Apply writing skills.	/////	/////
.1 Produce a technical report/research paper.		
.2 Communicate effectively through writing.		
.3 Write legibly.		
.4 Use correct grammar, punctuation and vocabulary.		
.5 Write using complete sentences/paragraphs.		
.6 Write and summarize key concepts.		
.7		
.8		
1.6 Acquire, use and transfer information.	/////	/////
.1 Use appropriate data collection techniques.		
.2 Use appropriate data reporting techniques.		
.3 Interpret acquired data.		
.4 Translate from technical to common language.		
.5 Communicate data to customers.		
.6		

Appendix 2, Sample Page, Level I, Round 2

FALLOUT PROFICIENCIES WRITE-IN STATEMENTS	Strong _____ Weak			
	4	3	2	1
<i>Critically analyze written materials.</i>				
<i>Infer meanings of unknown words and vocabulary.</i>				
<i>Demonstrate speed reading skills.</i>				

1.5 Apply writing skills.

///// /////

- .1 Produce a technical report/research paper. _____
Prepare a technical report/research paper/concept paper/evaluation. _____
- .2 Communicate effectively through writing. _____
Communicate effectively in writing, utilizing a logical flow of ideas. _____
- .3 Write legibly. _____
Use word processor. _____
- .4 Use correct grammar, punctuation and vocabulary.
- .5 Write using complete sentences/paragraphs.
- .6 Write and summarize key concepts.

1.6 Acquire, use and transfer information.

- .1 Use appropriate data collection techniques.
- .2 Use appropriate data reporting techniques.
- .3 Interpret acquired data.
- .4 Translate from technical to common language.
- .5 Communicate data to customers.

Appendix 3. Sample Page, Level II, Round 1

PROFICIENCY STATEMENT	RETAIN	REJECT/ MODIFY
1.0 PERFORM BANKING AND BOOKKEEPING FUNCTIONS.	////////	////////
1.1 Perform bookkeeping functions of a business office.	////////	////////
.1 Prepare and maintain payroll records.		
.2 Maintain inventory records.		
.3 Record transactions.		
.4 Operate petty cash fund.		
.5 Maintain accounts payable.		
.6 Maintain accounts receivable.		
.7 Make change.		
.8		
1.2 Perform the banking functions of a business office.	////////	////////
.1 Make deposits		
.2 Maintain check register		

Appendix 4. Sample Page, Level II, Round 2

1.0 PERFORM BANKING AND BOOKKEEPING FUNCTIONS.

1.1 Perform bookkeeping functions of a business office.

- .1 Prepare and maintain payroll records.
- .2 Maintain inventory records.
- .3 Record transactions.
- .4 Operate petty cash fund.
- .5 Maintain accounts payable.
- .6 Maintain accounts receivable.
- .7 Make change.

FALLOUT PROFICIENCIES WRITE-IN STATEMENTS	Strong_____Weak			
	4	3	2	1
<i>Have a basic knowledge of concepts such as debits, credits, cost of goods, etc.</i>				
<i>Demonstrate accuracy in addition, subtraction, multiplication, division, fractions, and percentages.</i>				

1.2 Perform the banking functions of a business office.

- .1 Make deposits
- .2 Maintain check register.
- .3 Reconcile accounts.

FALLOUT PROFICIENCIES WRITE-IN STATEMENTS	Strong_____Weak			
	4	3	2	1
<i>Write legibly.</i>				
<i>Demonstrate accuracy in addition, subtraction, multiplication, and division. account to be established.</i>				

**BUSINESS AND MANAGEMENT CAM CURRICULAR DEVELOPMENT
PROJECT,
CRITERIA FOR PROFICIENCY STATEMENTS**

DRAFT
February 14, 1995

Understand and Apply Economic Principles

**The student will be able to analyze, interpret and communicate the application
of economic principles at local, state, regional, national and global levels.**

Criteria

Exemplary Performance: The consistent demonstration of applied knowledge in the identification of a significant, complex economic problems or situations and their alternative solutions or probable effects, in the context of both local and global business practices and policies.

Quality Performance: The demonstrated ability to recognize and define the principle economic characteristics of business conditions relating to incentives, profits, trade, fiscal policies, employment, and government regulations, as these interrelate in a specific business environment.

In Progress: Developing knowledge, understanding and application of economic principles and their interrelationship in a business environment.

The student will be able to demonstrate an understanding of

- Economic history, research and forecasting techniques
- Supply and demand principles
- Business cycles, competition and regulation
- Monetary and fiscal policy
- International trade and tariffs
- Current personnel practices; labor and union issues
- The impact of cultural and environmental issues and conditions on economics

Implement Standard Business Practices and Procedures

The student will understand and be able to implement standard business practices and procedures utilizing available contemporary technologies.

Criteria

Exemplary Performance: The organization of work and procedures in a business office or work site that promotes confidence among workers, clients and the business community through reliable transactions, forward planning, use of efficient methods, technology and equipment, and the coordination of personnel resources to meet company objectives.

Quality Performance: The competent, dependable functioning within a business office or work site through the regular application of standard business practices, use of automated equipment for business transactions and communication, effective interaction with workers and clients, and support of company purposes.

In Progress: Partial knowledge of and ability to use standard business practices and automated systems; skill in client or worker interaction and understanding of business purposes and organization under development.

The student will be able to demonstrate the skills to:

- Perform banking and bookkeeping functions of a business office
- Maintain accounting and auditing systems
- Produce business documents
- Maintain current business operating procedures
- Conduct business transactions and perform business services
- Utilize efficient methods of electronic and manual record storage and retrieval
- Utilize electronic communication systems and telecommunications
- Enter into contracts
- Manage capital, make investments and maintain inventories
- Make decisions based on company goals, objectives, policies and procedures
- Interact courteously with clients, staff and business associates

Develop Business Career Potential

The student will comprehend and be able to pursue alternate career paths within the business environment and contribute to the growth and success of the employing company.

Criteria

Exemplary Performance: The comprehension of the generic hierarchical and lateral roles of varied business organizations, skill in discriminating between specialized and common functions and in applying both functions to new roles which expand opportunities, and the demonstrated ability to design and lead successful new ventures or projects which promote the goals of the company are regularly exhibited.

Quality Performance: The knowledge of various roles in a typical business organization, ranging from executive to technical, clerical, promotional and staff support functions; the ability to recognize parallel functions among roles and to pursue advanced or different roles, and demonstrable contributions to group efforts to realize company goals are evident.

In Progress: The recognition and understanding of various business roles and opportunities is developing; the ability to apply skills in one job role to other job roles is expanding; the concept of individual ideas and efforts contributing to company success, and thus individual benefit, is evolving.

The student will be able to demonstrate the skills to:

- Recognize similarities and differences among job functions within a business office, and progressive levels of skill and responsibility
- Prepare a resume, document credentials, apply for and interview for a business position
- Advance in a business career through increased skill and experience
- Employ entrepreneurial skills to develop a career or business

Communicate Effectively in a Business Environment

The student will be able to communicate effectively through the acquisition, organization and presentation of information, and to transfer and process information accurately and efficiently in a business environment.

Criteria

Exemplary Performance: The demonstrated ability to effectively communicate through two or more languages, through sign, visual and oral dialogue, and through graphic, mathematic and scientific idioms, and to translate these communications into accepted forms for various business groups; to encode data appropriately for business use or public statement.

Quality Performance: Command of and effective communication in the English language in oral and written form, essential communication proficiency in a second or sign language, and the demonstrated skills to read and present basic scientific symbols and statistical notation, graphs and charts appropriately to business and lay groups.

In Progress: The effective use of bilingual oral, written or sign language, and the use of symbolic language necessary to a business environment, is at a developmental stage.

The student will demonstrate the skills to:

- Listen attentively and summarize content, factual data and intent
- Assure comprehension through questions, paraphrase
- Comprehend, interpret and analyze written text, tables, graphs and charts
- Speak clearly, purposefully and concisely
- Write clearly and in an organized, logical sequence using standard and/or business English
- Transfer symbolic data into oral, written or graphic form
- Create or transcribe business documents directly into word processing, spreadsheet or graphic formats
- Process, send and receive information electronically
- Utilize telecommunications effectively
- Communicate in a second language

Manage Business Records and Documents Efficiently

The student will be able to establish and maintain a system of storing and retrieving business records and documents manually and electronically.

Criteria

Exemplary Performance: The organization and maintenance of various and numerous incoming, outgoing and inter-office documents so that they are easily accessible to all users, managing electronic and hard copy file systems; the rational abstraction and synthesizing of file data for business research, planning and reporting purposes.

Quality Performance: The demonstrated ability to efficiently store, maintain and retrieve business office records and documents electronically and manually using established office filing systems; the use of multiple file documents for preparing business reports.

In Progress: The processes for storing, retrieving and using office documents for business purposes are under development.

The student will be able to demonstrate the skills to:

- Establish, use and maintain alpha/numeric and subject filing systems, with cross-reference listings, for the manual and electronic storage of business records and documents
- Maintain security of confidential and classified files, and check out
- procedures for file material
- Enter, maintain, send and retrieve current electronic records in real time
- Update files by adding, merging, revising, purging or archiving records
- Utilize records and documents to establish and evaluate trends, statistics and business performance
- Abstract data from record and document files for reports or information systems

Analyze and Interpret Business Trends and Operations

The student will be able to understand business indicators and to analyze company productivity and planning in terms of the current economic climate.

Criteria

Exemplary Performance: The continual use of business trend data to validate or adjust inventories, prices, personnel resources and overhead costs in order to maintain company profitability; the design and use of information systems for planning and decision making.

Quality Performance: The demonstrated comprehension of business trend indicators and their probable effects on company policies and procedures; the ability to analyze trend data and use forecasting software to evaluate alternative business decisions.

In Progress: The developing understanding and use of business trend indicators and the growing recognition of their significance for business decisions.

The student will be able to demonstrate the skills to:

- Monitor, interpret and apply standard business climate indicators in terms of specific company goals and operations
- Apply statistical methods to forecast production goals and requirements, analyze variation in performance, and support decision processes
- Evaluate markets, wholesale costs, retail pricing, inventory needs and profit margins
- Identify market share, niche markets, growth potential, investment and capital development needs
- Apply research methodologies, including the definition of research parameters, methods of obtaining information, costs, analyses and presentation of results in visual and print formats

Promote Products and Services Convincingly

The student will be able to understand and generate promotional materials and procedures that enhance and validate products and services.

Criteria

Exemplary Performance: The consistently persuasive presentation of goods and services produced and sold by the company; the identification of potential products, clients and markets that benefit company goals; the design and organization of promotional activities.

Quality Performance: The regularly demonstrated attentive and positive interaction with clients that promotes the advantages of the products and services offered by the company; the planning and evaluation of alternate marketing and sales activities and their utility.

In Progress: The growing ability to promote business products and services through effective interactions with customers; increasing skill in identifying and determining successful marketing and sales methods and techniques.

The student will be able to demonstrate the skills to:

- Identify specific audiences and potential clients for promoted company products or services
- Organize a publicity campaign to attract customers to sales events
- Oversee and evaluate sales events for effective results
- Promote consumer advantages to consumers
- Evaluate competition for advanced products and services
- Plan for and project competitive strategies for promotion of sales to identified buyers or users of services

Collaborate for Business Problem Solving and Strategic Planning

The student will be able to work cooperatively with others to solve problems, define and develop group projects, and reach consensus on strategic planning goals and objectives for a business or units within a business.

Criteria

Exemplary Performance: Frequent acknowledged leadership in team efforts through the initiation and use of equitable group processes, facilitation of project goal setting and tasks, organization of work assignments utilizing skill diversity, and the maintenance of group morale and momentum; effective use of group processes for planning, reaching consensus, and achieving business and company objectives.

Quality Performance: Dependably cooperative, resourceful and responsible in contributing to group processes; demonstrably able to negotiate and to collaborate with team members of varied skills and interests in order to meet group and company objectives.

In Progress: The improving ability to act accountably and cooperatively in group processes; developing appreciation for collective efforts that further company objectives.

The student will be able to demonstrate the skills to:

- Participate in team procedures
- Accept personal responsibility for team efforts
- Facilitate cooperative efforts with diverse groups
- Utilize the varied skills and interests of team members in accepting or assigning tasks
- Negotiate with others to reach consensus
- Identify problems and collaborate with others to determine solutions
- Recognize the relationship between the company's major strategic planning goals, specific objectives and implementation tactics
- Organize work toward defined goals and objectives
- Make independent decisions when appropriate
- Interact with co-workers respectfully and congenially

Utilize Time, Personnel and Material Resources Pragmatically

The student will be able to determine the most efficient way to complete tasks, schedule meetings and conferences within time guidelines, and calculate the time, personnel and material requirements and costs of ongoing and special business activities.

Criteria

Exemplary Performance: The ongoing demonstration of efficiency in the use of time and both personnel and material resources; the ability to effectively prioritize tasks, reduce duplication of efforts, calculate the time and resource costs of ongoing and special business activities; the functional design and organization of business office work environments.

Quality Performance: The consistent, independent and responsible exercise of time and resource conservation; the ability to estimate time and resource requirements, to prioritize tasks and to organize office work spaces.

In Progress: Developing skill in assessing, organizing and managing time, resources and a personal work station independently.

The student will be able to demonstrate the skills to:

- Organize the work area and personnel of a business office
- Manage the work flow within a business office
- Define areas of responsibility
- Establish job priorities
- Select office furniture, equipment and accessories on the basis of health factors, environmental surroundings and cost considerations
- Determine supply and service needs and costs
- Calculate the time, personnel, material and costs of ongoing and special business activities
- Schedule and make arrangements for meetings and conferences

Understand and Comply with Legal, Health and Safety Requirements

The student will be able to identify and evaluate personal and business legal issues and comply with administrative, civil, criminal and constitutional law, and to understand and adhere to health and safety practices and regulations.

Criteria

Exemplary Performance: The thorough knowledge and application of business law and health and safety practices and regulations; the ongoing recognition of potential legal, ethical and workplace safety issues that may arise in business and personnel practices, with precautionary action initiated.

Quality Performance: The demonstrable general knowledge of and compliance with the legal, health and safety requirements of a business office; the ability to locate specific legal references and regulations; consistent practices to prevent accidents and maintain health.

In Progress: Increasing knowledge of and adherence to business legal, health and safety requirements; improving recognition of and compliance with health and safety standards.

The student will demonstrate an understanding of and the ability to comply with:

- Laws regarding personnel practices and business transactions
- Ethical principles in business management and operations
- Emergency procedures and regulations
- Fundamentals of accident prevention and health maintenance
- Occupational health and safety practices and regulations



Design Team

High Schools

ALOHA HIGH
ALTERNATIVE YOUTH ACTIVITIES
BANDON SENIOR HIGH
BROOKINGS-HARBOR HIGH
COQUILLE HIGH
DAVID DOUGLAS HIGH
ENTERPRISE HIGH
GILCHRIST HIGH
GLENCOE HIGH
GOLD BEACH UNION HIGH
GRESHAM HIGH
HOOD RIVER VALLEY HIGH
JEFFERSON HIGH
KLAMATH UNION HIGH
LOST RIVER HIGH
MARSHALL HIGH
MARSHFIELD SENIOR HIGH

BEAVERTON
COOS BAY
BANDON
BROOKINGS
COQUILLE
PORTLAND
ENTERPRISE
GILCHRIST
HILLSBORO
GOLD BEACH
GRESHAM
HOOD RIVER
JEFFERSON
KLAMATH
MERRILL
PORTLAND
COOS BAY

MOUNTAIN VIEW INTERMEDIATE
MYRTLE POINT HIGH
NORTH BEND SENIOR HIGH
PACIFIC HIGH
PHILOMATH HIGH
POWERS HIGH
REEDSPORT
REYNOLDS HIGH
ROOSEVELT HIGH
SABIN OCCUPATIONAL SKILLS
SAM BARLOW HIGH
SEASIDE HIGH
SOUTH ALBANY HIGH
SUTHERLIN HIGH
THE DALLES HIGH
WEST ALBANY HIGH
WESTVIEW HIGH
WILSON HIGH

BEAVERTON
MYRTLE
NORTH BEND
PORT ORFORD
PHILOMATH
POWERS
REEDSPORT
TROUTDALE
PORTLAND
MILWAUKIE
GRESHAM
SEASIDE
ALBANY
SUTHERLIN
THE DALLES
ALBANY
BEAVERTON
PORTLAND

Community Colleges

CHEMEKETA COMMUNITY COLLEGE	SALEM
CLACKAMAS COMMUNITY COLLEGE	OREGON CITY
CLATSOP COMMUNITY COLLEGE	ASTORIA
LANE COMMUNITY COLLEGE	EUGENE
LINN-BENTON COMMUNITY COLLEGE	ALBANY
MT. HOOD COMMUNITY COLLEGE	GRESHAM
PORTLAND COMMUNITY COLLEGE	PORTLAND
SOUTHWESTERN OREGON COMMUNITY COLLEGE	COOS BAY



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Work Exp Coordinator/Business Instructor
West Albany High School
Albany OR 97321-2196



Steering Committee

Private Sector:

ATTITUDES FOR SELLING
CREDIT ASSOCIATION OF PORTLAND
FIRST INTERSTATE BANK OF OREGON
FRED MEYER, INC.
G/S ASSOCIATES, INC.
GENERAL TOOL & SUPPLY
GEOCOMM-GLOBAL
NORTHWEST LABOR COUNCIL
OREGON BUSINESS COUNCIL
OREGON SOCIETY OF CPA'S
PLAZA MARKETPLACE
PORTLAND OPPORTUNITIES INDUSTRIALIZATION CENTERS
PROFESSIONAL EVENT MANAGEMENT
RED LION HOTELS & INNS
RIVERSIDE TRAVEL GROUP
SECURITY PLANNING GROUP NW
STANDARD INSURANCE COMPANY
A.O.I./OREGON RETAIL ASSOCIATION
U.S. BANK

Public Sector:

BUSINESS EDUCATION COMPACT
COTTAGE GROVE HIGH
LANE COMMUNITY COLLEGE
LINN-BENTON COMMUNITY COLLEGE
MT. HOOD COMMUNITY COLLEGE
OREGON DEPARTMENT OF EDUCATION
OREGON EMPLOYMENT DEPARTMENT
PORTLAND COMMUNITY COLLEGE
PRIVATE INDUSTRY COUNCIL
UNIVERSITY OF OREGON
WILLAMETTE HIGH



Steering Committee

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Manager Of Workforce Analysis Program
Ore. Dept. Human Resources/Emp. Div.

Nancy Conrath
Process evaluation consultant
HEIRS (Higher Ed Institutional Research)

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Legislative Representative
Associated Oregon Industries

Kathy Cooper

Oregon Employment Department

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Credit Association Of Portland

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PVLS-SME1
Security Planning Group NW

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Executive Director
Riverside Travel Group

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Business & Management Specialist
Oregon Department Of Education

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Staff
Oregon Employment Department

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The 3 Day Marketplace

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US Bank

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Asst. Vice Pres. Recruiting Manager
Fred Meyers, Inc.

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Executive Director
Business Education Compact

Wendy Hoffman

Standard Insurance Company

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Project Director
Oregon Business Council

Rick Howell
Manager Of Training
Red Lion Hotels & Inns

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Willamette High School

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School-to-Work Coordinator
Private Industry Council

Sue Jensen

Cottage Grove High School

Downer Johnson
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Geocom-Global

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Applied Communications
Mount Hood Community College

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Employment/Recruiting
First Interstate Bank of Oregon

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Linn-Benton Community College

Kay Lutz-Ritzheimer
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Lane Community College

Sonya McDowell
Division Dean, Business/Government
Portland Community College

Joseph McHenry
Assistant Director of Education
Portland Opportunities Industrialization

Colleen Mileham

State Department of Education

Jim Miller
Vice President, Sales & Marketing
General Tool & Supply Company

Larry Rhodes
Assoc. Dir. - Specialized Training Program
University Of Oregon, Specialized Training

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Director Of Employment
Red Lion Hotels & Inns

Roger Schoenborn
Regional Coordinator
Portland Public Schools

Glen Schuck

Northwest Labor Council

Kent E. Studebaker
Manufacturers' Representative
G/S Associates, Inc.

Kim Wier
Corporate Recruiting
Fred Meyer, Inc.

Bob Wynhausen
Certified Public Accountant
Oregon Society Of CPA's

Alan Zell
Ambassador Of Selling
Attitudes For Selling

WASHINGTON

May 12, 1995

MEMORANDUM FOR CAROL RASCO

CC: BRUCE REED
BILL GALSTON
JEREMY BEN-AMI

FROM: Paul Weinstein
Gaynor McCown

SUBJECT: 1995 Rescission Bill

Melissa -
Gun-Free School Zones
224-4933

It appears that the House-Senate Conference on the FY95 Rescission bill took a turn for the worst the last two days. Yesterday, conferees reached final agreement on more than \$12 billion worth of retroactive cuts. The conferees moved the rescission closer to the House passed bill rather than the Senate proposed rescission, which was much more favorable towards several of the President's investment initiatives. The final package:

- Completely eliminated funding for the President's Community Development Financial Institutions Fund. The Senate bill had provided \$37 of the original \$125 appropriated. The conferees agreed to eliminate all the funds, and use the \$37 million to fund the Bank Enterprise Act, which gives banks a break on their deposit insurance premiums if make socially conscious investments. This Administration has generally opposed this program as a giveaway to mainstream banks (which should be doing this lending under the Community Reinvestment Act anyway) and because it raises safety and soundness concerns with regards to the deposit insurance program.
- Included education cuts that are severe to say the least, and move substantially away from the Dole-Daschle Senate compromise -- e.g. \$950 million rather than \$400 million in cuts in education (including additional hits on Goals 2000, School-To-Work, Title I, Technology In Education, Safe and Drug Free Schools, Pell Grants, and Direct Lending.)
- National Service was cut by \$210 million. This is about half of the original House cut (\$416 million) but double the size of the Senate proposed rescission of \$105 million. The cut of \$210 million would eliminate any budget increase for the program in FY95.

- EPA's safe drinking water grants to states and communities was reduced by \$1.3 billion. This is a 19% cut in EPA's total budget and will be viewed by Governor's and local officials as another unfunded mandate.
- WIC was cut by \$20 million.
- HUD cuts reached \$6.3 billion, much closer to the House than the Senate-passed bill.

Because of the political minefields and delays with regards to the FY96 budget (Medicare, Medicaid, tax cuts, etc.) and due to the failure of the Balanced Budget Amendment, the Republican Leadership appears more interested in passing a strong rescission that shows they are tough on the budget deficit rather than reaching an agreement with the Administration. The rescission package now is much more extreme than the Senate version.

Congress of the United States**Washington, DC 20510**

May 2, 1995

The Honorable Richard W. Riley
Secretary
Department of Education
Washington, D.C. 20202

83458/0003
MAY 2 11:30 AM '95

Dear Mr. Secretary:

As you are aware, the State of Oregon is working with the federal government to establish a partnership called the Oregon Option. The Oregon Option is an agreement between the Administration and Oregon to pilot a new model of intergovernmental service delivery based on performance results. A Memorandum of Understanding formally establishing this relationship between our State and the Administration was executed on December 5, 1994. Specifically, the State and its federal partners agreed to pursue the Oregon Option in three areas: workforce development; childhood health; and family stability.

Since last winter, Oregon and the appropriate federal departments have been working to reach agreement on the benchmarks and performance standards by which Oregon's progress will be judged in these three critical areas. Earlier this month Oregon representatives met with the Departments of Labor, Education, Health and Human Services, and the Office of Management and Budget, during a two-day meeting in Washington, to attempt to finalize agreements on the workforce development cluster. This meeting resulted in the establishment of six benchmarks for the workforce cluster which were accepted by all the partners. The State is now working on reaching agreement on performance standards which will help to meet the benchmarks. Once the performance standards are in place, Oregon will ask the federal government to waive some of the federal regulations that limit flexibility, stifle innovation and result in a continued focus on maintenance of effort rather than prevention. Ultimately, this undertaking will yield a model in which Oregon and its federal partners agree on measurable outcomes and the State is then held accountable for its performance.

Recently, the U.S. Senate endorsed the Oregon Option by adopting a Senate Resolution during consideration of the Paperwork Reduction Act of 1995 on March 6. The resolution encourages the federal government to continue in its partnership with the State and local governments of Oregon to fully implement this unique project.

The Honorable Richard W. Riley
Page Two

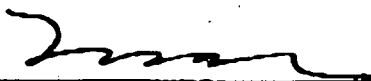
Unfortunately, one of the realities that Oregon and its federal partners discovered at the April 10 and 11 meetings is that administrative and regulatory waivers alone will not meet the needs of the Oregon Option. Many of the barriers to achieving this new model of intergovernmental service delivery are statutory.

Your department can best define for the Congress what statutes need to be changed, modified or waived for the purposes of achieving the Oregon Option. We are asking for your help in making this identification. We are particularly interested in knowing whether the waiver authority already granted to Oregon under the Education Flexibility Partnership Demonstration Act will provide the necessary relief from these burdens. Once we have identified any remaining statutory barriers to the Oregon Option, the Oregon Congressional Delegation intends to seek the necessary legislative remedies.

Further, as we embark on this path to reform, it would be helpful if you would assign an individual within your department to serve as a key point of contact for our staff. We eagerly anticipate your reply and request that you respond by May 19, 1995. Your attention to this matter is greatly appreciated.

With kind regards.

Sincerely,



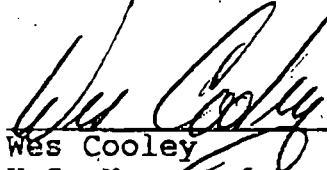
Mark O. Hatfield
United States Senate



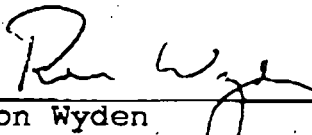
Bob Packwood
United States Senate



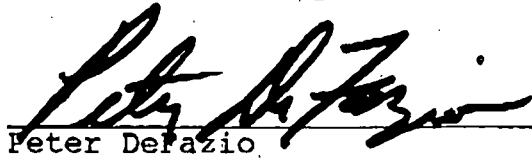
Elizabeth Furse
U.S. House of Representatives



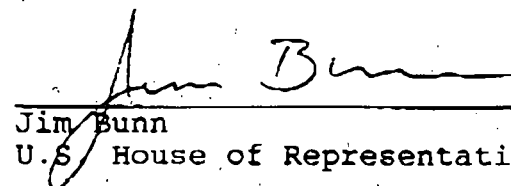
Wes Cooley
U.S. House of Representatives



Ron Wyden
U.S. House of Representatives



Peter DeFazio
U.S. House of Representatives



Jim Bunn
U.S. House of Representatives

The purpose of this memorandum is to convey to you the support and interest of the White House for the creation of the Interagency Office on Forestry and Economic Development in the Pacific Northwest. We are excited this effort is being undertaken and are enthusiastic about the designation of Tom Tuchmann as the Director of the Office.

In pledging to resolve the northern California and Pacific Northwest's forest crisis, the President promised to untangle a complex web of administrative inaction, court orders, and interagency differences. On July 2nd the President announced his Forest Plan for a Sustainable Economy and Sustainable Environment (see attached). The plan has been nationally recognized for the manner in which it attempts to reconcile the jobs vs. environment issue. We now need a "full-court press" strategy to ensure the effective implementation of the plan.

The Administration has already made some significant progress on this front. The attached memoranda of understanding, which most of you recently signed, were drafted to help guide the implementation effort. A forest management Interim Interagency Implementation Team has been formed in Portland, Oregon. The states and National Economic Council have established working relationships to provide more effective delivery of worker and community assistance programs. All agencies have been working to secure funding for program implementation within existing overall budget constraints for FY 1994 and FY 1995.

Yet, the plan is complex and there is little margin for error. To ensure successful plan implementation, the Administration is establishing an Interagency Office of Forestry and Economic Development.

PURPOSE AND RESPONSIBILITIES:

The primary responsibilities of this office include:

- fostering close coordination among agencies and work groups at the regional level;
- ensuring proper and continual coordination between regional activities and Washington-based policy and budget initiatives;
- assisting agencies in plan implementation;
- serving as a visible point of contact for state/community groups;
- enhancing the close coordination of public communications on the President's plan within the region;
- providing a visible expression of the President's continuing commitment to full and aggressive implementation of his program.

The Interagency Office of Forestry and Economic Development will be located in Portland, Oregon for two years. Portland is centrally located within the region, which will make travel to northern California and the Pacific Northwest easier.

The Director will serve as the primary Administration representative on all issues relating to

the implementation of the plan, both within the region and also between the region and Washington-based implementation activities. The Director shall serve as a liaison to all agencies and provide reports to the White House about progress on all fronts -- from forest practices, to economic assistance, to the progress on moving timber to mills. All agency personnel in Washington, and in the region, will give the director full cooperation so that the President's plan is fully implemented. We expect this effort involving several agencies to be a shining example of the Clinton Administration's "Reinvented Government".

In this capacity the Director or his designee will oversee both the Regional Interagency Executive Committee and Community Economic Revitalization Team. The Director will also serve as member and liaison to the Washington, D.C.-based Interagency Executive Committee and Multi-Agency Command. Working with the agencies, the Director will also be responsible for ensuring the effective and timely communication with the Congressional delegation, other community groups and the public generally on all matters relating to plan implementation.

Mr. Tom Tuchmann will serve as Director of the Office. Tom is a forester who understands both the technical and policy components of the region's forestry issues. Tom served as co-chair of the President's transition team effort on the Forest Conference. As Special Assistant to Secretary Babbitt, Tom assisted in designing the Forest Conference and subsequent planning efforts. Attached is a brief biography for your information.

We are all looking forward to successful implementation of the President's forest plan and feel confident that this new interagency office will contribute greatly to our success.

Attachments:

Forest Plan for a Sustainable Economy and Sustainable Environment
Worker and Community Assistance MOU
Forest Management MOU
Tuchmann Biography

THE ECONOMY IN THE NORTHWEST AND NORTHERN CALIFORNIA

- Average annual employment in the 3-state region covered by the President's Forest Plan grew 67-percent between the early 1970s to the late 1980s (versus 45-percent growth for the U.S.)
 - Unemployment in Oregon, the state most heavily impacted by the Forest Plan, is at its lowest level in 25 years
- Economic performance within the region has varied quite widely, but has been dominated by metropolitan growth--located principally along the Interstate 5 corridor with Seattle in the north, Portland on the Columbia River, and Sacramento in the south
- For Oregon, half the labor force works in the Portland metropolitan area, and 75-percent works in the Willamette valley, which runs from half-way down the State from Portland in the north to Eugene in the south
- Disparity between metropolitan and nonmetropolitan (mainly rural) areas follows a pattern similar to the nation: nonmetropolitan areas have lower levels of educational achievement, lower per-capita income, lower quality of health care, and higher rates of unemployment
 - Rural areas in the three states remain heavily tied to natural resource extracting and processing industries--principally timber, fishing or agriculture
 - Current unemployment (February, 1995) in the counties outside the Portland metropolitan area, but inside the Forest Plan area in western Oregon and northern California (Washington data were not available), average 8.3-percent versus 5.9-percent for the U.S. The nonmetropolitan figures for Oregon include both urban and rural places, while the U.S. figures are dominated by numbers from the nation's metropolitan areas
- Wood products remains an important part of the economic base of the region, though its importance to the region's economy as a whole, and its importance in rural, resource-dependent areas has been declining
 - During the early 1970s almost 10-percent of the affected region's employment was in timber-related industries, whereas by the late 1980s this proportion had fallen to 5-percent
 - Employment in the wood products industries has been relatively unchanged since the President's Forest Plan was announced, though the composition of the industries has changed modestly, with losses in logging and increases in secondary or value-added manufacturing



United States Office of Forestry and Economic Development

333 S.W. First Avenue, P.O. Box 3623, Portland, Oregon 97208-3623

The President's Forest Plan: Breaking Gridlock and Moving Forward

For years, an uncertain future loomed before the people and communities in Oregon, Washington and California as disagreements grew over the management of public forest lands, which created conflict, division, and ultimately gridlock.

To put an end to the gridlock and move the region forward, on April 2, 1993, President Bill Clinton convened the Forest Conference in Portland, Oregon. For the first time in history, environmentalists, timber companies, Native American tribes, and local, state and federal governments sat down together at one table and focused on the future of natural resources management.

From the Forest Conference came the President's Forest Plan, whose goals were clear:

- * Support the region's communities during a period of economic transition
- * Provide a sustainable timber economy
- * Protect and enhance the environment
- * Make federal agencies work together as one government

The President's Forest Plan was released only six months ago, yet it is already being successfully implemented on the ground, with many significant accomplishments:

To support the people and their communities through this period of transition, in 1994 more than \$126 million in grants and loans were awarded to more than 100 communities throughout the region creating opportunities for new jobs, job training programs, community infrastructure, small business assistance and other efforts.

To protect and enhance the environment, in 1994 more than 400 watershed restoration projects were completed or initiated, putting people to work repairing and enhancing streams, waterways and other restoration projects.

Years of gridlock were broken within two months after the President released his science-based forest plan, when federal courts lifted injunctions banning timber harvesting on some federal lands, which allowed timber sales in owl habitat to move forward for the first time in three years.

While there is still much to do in the years ahead, a solid foundation is now in place for complete and successful implementation of the President's Forest Plan.

The President's Forest Plan consists of three main components:
Economic Revitalization, Forest Management, and Interagency Cooperation

The following pages outline in more detail the Forest Plan's goals, implementation, and highlight some of the many other accomplishments to date.

Economic Revitalization

The Economic Adjustment Initiative is aimed at providing immediate and long-term relief for people, businesses and communities affected by changes in forest management practices.

The people attending the Forest Conference clearly stated they wanted the opportunity to determine their own economic futures, but in order to do it effectively government red tape had to be cut, and financial and technical assistance had to be delivered where and when it was needed.

To accomplish those goals, ideas from people and communities are gathered and considered by one-stop centers for all types of financial assistance called the **Community Economic Revitalization Team (CERT)**. Each state has one CERT whose membership is individually tailored to deal with the needs of workers, families, businesses and communities in their state.

To eliminate red tape, the CERTs are working to streamline government and overcome bureaucratic barriers. *By the end of fiscal year 1994, 25 barriers of red tape had been removed.*

In FY 1994, more than \$126 million in grants and loans were awarded for more than 160 projects in over 100 communities throughout the region to help with job training, small business assistance, community infrastructure and many other efforts.

While the list of projects and communities is extensive, the economic assistance projects can be placed into four main targeted areas:

Assistance to Workers and Families

Example: \$6.6 million to Oregon and \$1.8 million to Washington to retrain more than 1,750 dislocated workers

Assistance to Business and Industry

Example: \$33 million in grants to stimulate business growth and economic development projects in rural communities in Oregon, Washington and California

Assistance to Communities

Example: More than \$45 million in grants and loans to help rural communities in Oregon, Washington, and California plan and build water and waste treatment facilities and other improvements to community facilities and infrastructure

Ecosystem Investment

Example: \$27 million to fund more than 400 watershed restoration projects in Oregon, Washington and California, restoring the environment and providing jobs

The President's Forest Plan hopes to distribute more than \$900 million to the region over the remaining four years of the Economic Adjustment Initiative. While more than \$248 million in grants and loans were available from a variety of federal programs and agencies in 1994, the overwhelming majority of the money spent was in the form of grants, and the remaining unspent funds were due to a lack of demand for the loans and loan guarantees.

Forest Management

The goal: Create a science-based natural resources management plan that both protects the environment and provides for a sustainable timber harvest.

Recognizing forests are a complex network of biological systems, the Forest Plan calls for innovative **ecosystem management** planning. To plan for the future of these ecosystems, Washington, Oregon and California are broken into 12 provinces that share common aquatic and terrestrial characteristics, with watersheds serving as the basis for the planning areas to help assure clean water for people and healthy habitat for fish and wildlife.

When the President's science-based Forest Plan was released on April 13, 1994, within two months **federal courts lifted injunctions banning timber harvesting on public lands, allowing timber sales in owl habitat to move forward for the first time in three years.** To protect the environment around riparian areas and aquatic habitat, timber sales are designed to limit impacts on streams in the region. While it will take a few years to reach the forest plan's target level, **timber sales** are expected to be about 1.1 billion board feet per year.

In fiscal year 1994, the following was also accomplished:

- * 252 million board feet of timber was sold from public lands within the range of the northern spotted owl
- * An additional 257 million board feet was sold from public lands outside the range of the northern spotted owl
- * 1.28 billion board feet was actually harvested: 851 million board feet within the range of the northern spotted owl/376 million outside of the range of the northern spotted owl
- * Initiated scientific review of proposed management actions in late-successional reserves and allowed ecologically sensitive activities to move forward.

An **Aquatic Conservation Strategy** is aimed at restoring and maintaining the ecological health of watersheds. The strategy provides direction for watershed analysis, restoration and monitoring for the region.

Among the accomplishments in 1994 to implement the Aquatic Conservation Strategy:

- * **Completed or initiated 400 watershed restoration projects, which are restoring streams and putting people to work.** For example, two teams of displaced timber workers in the Olympic and Willamette National Forests earned family wages while being trained for and implementing watershed restoration projects. This type of successful program will be applied in other forests throughout the region in 1995.
- * **Completed analysis of 34 watersheds**
- * **Analysis of an additional 40 watersheds underway**
- * **Completed a uniform guidebook for watershed analysis**

The Forest Plan also develops creative new management techniques such as **Habitat Conservation Plans, which allow landowners to move forward with their economic goals while still conserving forests and waterways for habitat preservation.** Currently, negotiations are underway with 25 landowners on Habitat Conservation Plans which would cover nearly 3.7 million acres in Oregon, Washington, and California.

A framework was developed for regional research, scientific oversight, and monitoring plans to ensure that the implementation of projects will be monitored now and in the future, and that up-to-date scientific information on ecosystem management will be shared between all participating groups.

The Forest Plan recognizes six different types of **federal land allocations** to preserve old growth forests, protect the environment, and allow for timber harvest of trees less than 80 years old, or salvaging activities that help promote characteristics of ancient forests:

Riparian Reserves: 2.2 million acres along streams and wetlands to protect and enhance clean water and to create habitat.

Adaptive Management Areas: 1.5 million acres consisting of ten areas intended for innovative forest management. They are located near forest-dependent communities.

Matrix Lands: Includes 4.9 million acres outside of reserves and withdrawn areas which are available for timber harvest.

Congressionally Withdrawn Areas: 7 million acres of National Parks, wilderness areas, national monuments and other federal lands where timber harvest is prohibited.

Late-successional reserves: 7.1 million acres of federal lands where old-growth or late successional cutting is prohibited.

Administratively Withdrawn Areas: 1.7 million acres of federal land to be used for various uses such as experimental forestry, research, recreation, and scenic areas.

The plan also establishes ten **Adaptive Management Areas (AMA)** within the forest plan region. These AMA's will become living laboratories where experimenting with innovative, environmentally sensitive forest management techniques will be encouraged and developed.

The AMA's will also allow the opportunity for people to play an important new role in helping determine for the future of their local forests, by working with their local federal agencies at the grass-roots level developing new experimental forestry techniques and plans for their AMA. Federal guidelines establishing this process were put together in the fall of 1994, and the AMA's are now getting their public participation processes underway.

Interagency Coordination

Instead of creating more bureaucracy, the President directed existing federal agencies involved with the forest plan to work together as one government in creative new interagency groups.

In an unprecedented effort by the federal government, the interagency groups have brought the federal agencies who are developing, monitoring, and overseeing the forest plan to the table, where they are effectively working together to implement the forest plan. Agencies are now working as one government and saving money by jointly coordinating efforts, improving communication, sharing information, and eliminating duplication.

With the President continuing with his commitment to downsize federal government, each agency involved with the forest plan redirected their priorities and dedicated time, staff and resources to the interagency groups to make the forest plan work.

The **Interagency Steering Committee** (ISC) establishes overall policies for the forest plan. The committee is chaired by the White House Office of Environmental Policy and its members include the Cabinet-level offices of the Secretary of the Interior, Secretary of Agriculture, Administrator of the Environmental Protection Agency, and the Secretary of Commerce.

The **Regional Interagency Executive Committee** (RIEC) serves as the senior regional body implementing the forest plan, coordinating and communicating policies with agencies in the forest plan area. Members of the committee include the Pacific Northwest and California directors of the Bureau of Land Management, Forest Service, Fish and Wildlife Service, National Marine Fisheries Service, Bureau of Indian Affairs, the Environmental Protection Agency, and the National Parks Service. Advising the RIEC is the **Regional Intergovernmental Advisory Committee** (RIAC), which ensures key participation from the state and tribes within the region.

The **Regional Ecosystem Office** (REO) provides independent recommendations and scientific, technical and other staff support to the RIEC to help implement the forest plan. Staff of the REO are on loan from federal agencies involved with the forest plan.

Each of the 12 provinces has a **Provincial Interagency Executive Committee** (PIEC), made up of federal agency directors who oversee the implementation of the Forest Plan within their province. A major component of the PIEC are the **Advisory Committees**, made up of community, business, environmental groups, Native American tribes, and federal, state, and county officials who directly advise the PIEC. The PIEC Advisory Committees are the grass-roots contact for involvement in the Forest Plan process.

Assisting the Economic Adjustment Initiative are the **Multi-Agency Command** (MAC) and the **Regional and State Community Economic Revitalization Teams** (RCERT and CERT). The MAC members include the sub-Cabinet-level offices of the Secretary of Commerce, Secretary of Labor, Secretary of the Interior, Secretary of Agriculture, Secretary of Housing and Urban Development, Secretary of Transportation, Small Business Administration, and other federal officials. RCERT and state CERT members include representatives from California, Oregon, Washington, Native American tribal organizations, and federal agencies responsible for awarding grants and loans.

Economic Adjustment Initiative Questions and Answers

1. What is the Northwest Economic Adjustment Initiative ?

The NEAI is the community assistance part of President Clinton's Forest Plan Initiative in Washington, Oregon, and Northern California. The Economic Initiative began in November, 1993 with the formation of the Regional Economic Revitalization Team (RCERT) and equivalent state CERTS for Washington, Oregon and California.

The Administration has dedicated \$1.2 billion in grant and loan funds over the next five years to the Initiative. For the first year (Fiscal Year 1994) \$254 million was dedicated to the Initiative. The federal agencies directly involved in the NEAI obligated \$156 million during FY 1994 to help more than 1200 communities in the region.

The Initiative is a partnership between the states, county and local governments, and participating federal agencies.

States, communities and private business have participated by complete or partial funding of many projects. Some of the benefits as a result of the Initiative do not involve direct funding. These benefits include business and job counseling programs, and in-kind support services for outreach programs.

2. How many federal and state agencies are directly involved in the NEAI?

Originally nine federal agencies were involved. There are now 12 agencies and they include The Rural Development Administration (RDA), Bureau of Land Management (BLM), The USDA Extension Service, The Environmental Protection Agency (EPA) The Economic Development Administration (EDA), Small Business Administration (SBA), The Department of Housing and Urban Development (HUD), Department of Labor(DOL), US Fish and Wildlife Service (USFWS), The U.S. Forest Service (USFS), U.S. Army Corps of Engineers, and The Bureau of Indian Affairs.

Three state agencies are involved, and include the Washington Governor's Office, the Oregon Economic Development Department, and the California Resources Agency. Within each of the states, other state agencies also participate.

Tribes have a communications link at the table in the Intertribal Timber Council. Since one tribe cannot represent another tribe at the CERT because of each tribe's nation to nation status with the federal government, the tribes selected the Council to represent them at the RCERT level.

3. What is a CERT?

Each state has a Community Economic Revitalization Team (CERT), as does the region (RCERT). The RCERT is made up of the regional representatives of the 12 federal agencies, as well as representatives from each of the three states and tribes.

The state CERTS include state representatives for each of the 12 federal agencies; and depending on the individual state, state CERTS also include representatives of county and local governments, as well as special interest groups. Each State CERT member was appointed by the governor of the state.

The State CERTS are the collecting, as well as the support points, for projects that local governments would like to see funded; and, State CERTS assign lead agencies.

The RCERT is responsible for the equitable distribution of funds and addressing impediments to the efficient and timely distribution of funds and government services.

4. Do State CERTS have the power to appropriate, allocate or obligate NWEAI funds? Timber Initiative Money?

No! State CERTS provide information to the federal agencies. They do not give advice or have the power to appropriate, allocate or obligate NWEAI or Timber money.

5. Is the NWEAI new money, is it reprogrammed money, is it existing money?

Money for this Initiative has been set aside and allocated especially for this region.

6. Would dollars being funneled through the NWEAI have ended up in the Northwest regardless of the Forest Plan?

No! a significant portion of the funds for the Initiative are dollars allocated specifically for the region. For example, specific job training dollars were made available as were Forest Service community assistance grants.

RDA made special reserves for the region and the Secretary of Agriculture allocated all of RDA's program funds in Oregon, Washington, and California to the Initiative. Funds were focused in the impacted region that would have been spent in other regions of the USA and other regions of each state.

7. Can government agencies produce an accounting of where timber dollars are spent, and what were the results?

Yes! A new system is being developed for the first time in the region to track the activity of all 12 federal agencies. Each agency knows exactly where its dollars have been spent.

8. How much money has gone for consultants and administrative costs?

No dollars are deducted from RDA's funds for federal administrative cost. Each RDA dollar is for programs. BLM took no administrative dollars from the Jobs in the Woods program this year. Other agencies are limiting administrative costs to 15 percent of program costs.

9. What retraining programs are available?

Each state has a variety of retraining programs available that use state, local and federal funds.

10. Who is responsible for the retraining programs?

The Department of Labor makes grants available to states. Individual states are responsible for retraining programs.

11. Has the President's solution added layers of government to the issue?

Simplifying government has been the result of the Initiative. State CERTS take a two page proposal and assign it to a lead agency. This means that a community does not have to apply to 12 separate federal agencies for funding, permits and approvals.

If a lead agency cannot fund the entire project it takes the responsibility to contact the other federal and state partners to seek additional funding. The Initiative uses existing federal programs.

Federal agencies now cooperate on the creation of the environmental assessment needed for each project. Sometimes projects from three agencies have generated three separate assessments, now agencies cooperate and use the assessment by the lead agency.

In fact, a draft agreement has been submitted to each agency that would allow one set of paper work to meet the requirements for all agencies that participate in a project. While not perfect, the system has speeded and simplified the process for communities.

Program by program, we are changing the system by identifying and removing barriers. We cannot change and remove all the barriers, but the process has given agencies the opportunity to take responsibility for the barriers that can be removed.

12. Are government agencies skimming money for administrative costs?

Absolutely not! One fulltime person has been hired to provide administrative support to a process that involves 12 federal agencies, three states and 42 tribes.

Agencies have cut normal administrative cost. Many agencies do not deduct administrative cost from program dollars. No one who has examined the process can say that the process, or the agencies are skimming money for administrative expenses.

13. Are there examples where the process has produced results?

Yes! The results from this process are both short and long term. We can give several examples from throughout the region on request. The examples range from the rehabilitation of existing timbermills, to the establishment of revolving loan programs to attract and retain business, and the financing of infrastructure projects such as sewerage to attract business and industry.

14. To make the program look good, is the RCERT counting money that is not part of the program?

The RCERT tracks SBA loans and loan guarantees in the region. This is being done because during the Forest Conference in 1993, the lack of capital investment in communities was identified as a problem. There is a 10 percent increase in loan activity in the impacted region.

People have claimed incorrectly that the RCERT is counting SBA money as part of the Initiative. This money is not being counted as part of the Initiative, but as an indicator of

THE WHITE HOUSE
WASHINGTON

November 29, 1993

MEMORANDUM FOR

SECRETARY BABBITT, DEPARTMENT OF THE INTERIOR
SECRETARY BROWN, DEPARTMENT OF COMMERCE
SECRETARY CISNEROS, DEPARTMENT OF HOUSING AND
URBAN DEVELOPMENT
SECRETARY ESPY, DEPARTMENT OF AGRICULTURE
SECRETARY REICH, DEPARTMENT OF LABOR
ADMINISTRATOR BROWNER, ENVIRONMENTAL PROTECTION
AGENCY
ADMINISTRATOR BOWLES, SMALL BUSINESS
ADMINISTRATION
LEON PANETTA, OFFICE OF MANAGEMENT AND BUDGET
BOB RUBIN, NATIONAL ECONOMIC COUNCIL
KATIE MCGINTY, OFFICE ON ENVIRONMENTAL POLICY
JOAN BAGGETT, OFFICE OF POLITICAL AFFAIRS
MARK GEARAN, COMMUNICATIONS OFFICE
CAROL RASCO, OFFICE FOR DOMESTIC POLICY

FROM:

ROY NEEL, DEPUTY CHIEF OF STAFF

SUBJECT:

OFFICE OF FORESTRY AND ECONOMIC DEVELOPMENT

BACKGROUND:

"We must never forget the human and economic dimensions of these problems. Where sound management policies can preserve the health of forest lands, sales should go forward. Where this requirement cannot be met, we need to do our best to offer new economic opportunities for year round, high wage, high-skill jobs. We may make mistakes but we will try to end the gridlock within the federal government and we will insist on collaboration, not confrontation."

- President William J. Clinton
White House Forest Conference
Portland, Oregon
April 3, 1993

THE ECONOMIC ADJUSTMENT INITIATIVE

- At the Forest Conference in April, 1993, the President observed "We must never forget the human and economic dimensions of these problems."
- The Economic Adjustment Initiative is one of the three parts of the President's Forest Plan, and provides "New economic assistance to help local workers, businesses and communities to strengthen the region's economy, create family-wage jobs, offer new economic opportunities and ensure the region's long-term health."
- Both economic and technical assistance are included: \$1.2 billion is targeted to the region over the 5-year duration of the Initiative (approximately \$270 million per year)
- The Initiative is comprehensive, and provides economic and financial assistance in four key areas:
 - Assistance to workers and families through increased funding under the Job Training Partnership Act (\$12 million available in FY 95)
 - Assistance to businesses and industry through an array of loan, loan guarantee, direct grant, and pass-through grant programs administered by the Small Business Administration, Rural Economic and Community Development Service, Forest Service and Economic Development Service, Forest Service, and Economic Development Administration (\$83 million available in FY 95)
 - Assistance to communities for infrastructure development through Water & Wastewater, Community Facilities, and housing programs administered by the Rural Economic and Community Development Service and the Department of Housing and Urban Development (\$135 million available in FY 95)
 - Watershed restoration work through the Jobs-in-the-Woods program (contracts and agreements) administered by the Forest Service, Bureau of Land Management, Fish and Wildlife Service, Bureau of Indian Affairs, and Environmental Protection Agency (\$37 million available in FY 95)
- The Initiative is a new way of doing business. State Community Economic Revitalization Teams (State CERTS), Regional Community Economic Revitalization Team, and the Multi-Agency Command (in Washington, D.C.) work on the Initiative. State CERTs are organized by the Governors and oversee the day-to-day operations of running a one-stop shop for financial and technical assistance; the RCERT works on barriers and impediments to program delivery, oversees the equitable distribution of funds across states, and promotes intra-regional communication; the Multi-Agency Command has policy oversight for the Federal government. The State CERTs are composed of representatives of all of the participating federal agencies, associated state agencies, state officials, tribal representatives, and local and county government officials; representatives from the

private sector representatives also serve at the discretion of the State CERT chair, who is appointed by each state's Governor

- Funding of proposals follows local priorities. Financial assistance in the business & industry and community infrastructure categories must first be prioritized at the county level before they are considered by the State CERTs.
- Financial assistance can be flexibly customized to fit the circumstances of the proposal-- funding may come from more than one federal program, may be combined with state funds or funds from other sources, and may be in the form of grants, loans, loan guarantees, or a combination thereof
- Nine federal agencies provide financial assistance through commitments made in an Interagency MOU on Economic Assistance: Department of Labor, Rural Economic and Community Development Service, Forest Service, Economic Development Administration, Department of Housing and Urban Development, Bureau of Land Management, Bureau of Indian Affairs, Fish and Wildlife Service, and the Environmental Protection Agency. The Small Business Administration provides both technical and financial assistance, but isn't included in the MOU. The Extension Service and Corps of Engineers provides technical assistance only.
- More than \$126 million in assistance reached the region last fiscal year. The breakdown, by category of assistance and job estimates was:

Workers and Families Assistance	\$8.4 million	1,600 retraining opportunities*
Business and Industry Assistance	\$38.8 million	4,400 jobs*
Communities and Infrastructure	\$47 million	1,200 jobs*
Watershed Restoration/Jobs-in-Woods	\$32 million	2,200 jobs (600 fte)*

*Jobs figures are estimates provided for planning purposes only and are not for public release

- An estimated 400-500 dislocated timber workers were employed by the Jobs-in-the-Woods contractors
- 20 dislocated timber workers were retrained to become part of the forest ecosystem workforce of the future; the number should increase to 500 in 1995
- Current projections indicate that more than \$210 million will reach the year in FY 1995

- \$15.7 million in relief for salmon fishers has been or is being provided to the three-state region, but is not included in the Economic Adjustment Initiative. The salmon disaster relief money includes \$700 thousand in Economic Development Administration capacity building grant monies, \$3 million in Rural Economic and Community Development rural business and enterprise grant monies, \$6 million in watershed restoration work to be administered by the Natural Resources Conservation Service, \$4 million to be used in Washington to buy out fishing permits, and \$2 million to be used to have dislocated fishers collect fisheries data

THE FOREST PLAN: FOR A SUSTAINABLE ECONOMY AND A SUSTAINABLE ENVIRONMENT

President Clinton's Forest Plan for a Sustainable Economy and a Sustainable Environment is a comprehensive and innovative blueprint for forest management, economic development, and agency coordination aimed at strengthening the long-term economic and environmental health of the region. For too long, contradictory policies from feuding agencies have blocked progress, creating uncertainty, confusion, controversy and pain throughout the region. President Clinton's plan reflects his commitment to break the gridlock with a courageous, new approach that balances economic and environmental concerns.

The Forest Plan provides:

- o A sustainable harvest that will allow timber sales and logging based on a scientifically-sound and legally-responsible plan, improving forest management and ending the confusion and uncertainty of past policies;
- o New economic assistance to help local workers, businesses and communities to strengthen the region's economy, create family-wage jobs, offer new economic opportunities and ensure the region's long-term economic health, confronting economic issues ignored by past Administrations;
- o An innovative, new approach to environmental protection focusing on key water supplies and valuable old growth forests, that will once again base forest management on science and a respect for existing law;
- o A comprehensive system of old growth reserves to protect old growth ecosystems;
- o New opportunities for people in the region to participate in decisions regarding management of the nation's forests for the economic and environmental benefits they provide and to help plan for their future;
- o Improved coordination among federal agencies responsible for managing federal lands, ensuring that federal agencies will work together, with state and local officials, with tribes, and with private landowners for the best interests of the people and communities in the region, instead of working against each other, undermining the law and creating gridlock.

BACKGROUND

On April 2 in Portland, Oregon, President Clinton convened the Forest Conference as the first step toward a balanced and comprehensive policy that would recognize the importance of the forests and timber to the economy and jobs in the region and recognize the importance of America's old

growth forests, and the rivers and streams and wildlife that are so much a part of America's national heritage and the region's natural treasures.

The Forest Conference fulfilled a commitment President Clinton made to the people of the Pacific Northwest and Northern California to break the gridlock that has blocked progress on these issues with a comprehensive, innovative, and balanced plan for the region's long-term economic and environmental health.

"The most important thing we can do," President Clinton said in opening the conference, "is to admit, all of us to each other, that there are no simple or easy answers. This is not about choosing between jobs and the environment, but about recognizing the importance of both and recognizing that virtually everyone here and everyone in this region cares about both."

At the Forest Conference, the President, the Vice President, key members of the Cabinet and other top Administration officials talked with people from throughout the region representing a broad range of views and perspectives -- many of them adversaries who had spent more time fighting each other than working together. The Forest Conference provided a first-hand understanding of these issues and how the people in the region have been and will be affected.

At the close of the Forest Conference, President Clinton directed his Cabinet to action with five fundamental principles to guide them. President Clinton said:

- o "First, we must never forget the human and economic dimensions of these problems. Where sound management policies can preserve the health of forest lands, sales should go forward. Where this requirement cannot be met, we need to do our best to offer new economic opportunities for year-round, high-wage, high-skill jobs.
- o Second, as we craft a plan, we need to protect the long-term health of our forests, our wildlife, and our waterways. They are ... a gift from God and we hold them in trust for future generations.
- o Third, our efforts must be, insofar as we are wise enough to know it, scientifically sound, ecologically credible, and legally responsible.
- o Fourth, the plan should produce a predictable and sustainable level of timber sales and non-timber resources that will not degrade or destroy our forest environment.
- o Fifth, to achieve these goals, we will do our best to make the federal government work together and work for you. We may make mistakes but we will try to end the gridlock within the federal government and we will insist on collaboration, not confrontation."

Three working groups were established immediately after the Forest Conference: 1) Ecosystem Management Assessment to focus on forest management; 2) Labor and Community Assistance to focus on economic development; and 3) Agency Coordination to focus on how federal agencies work together. These working groups were comprised of scientists and experts from across the agencies involved (the Departments of Agriculture, Interior, Commerce, and Labor, as well as the Environmental Protection Agency, the White House Office on Environmental Policy, the National Economic Council, the Office of Science and Technology Policy, the Office of the U.S. Trade

Representative, the Council of Economic Advisors, the Office of Management and Budget, and the Domestic Policy Council). They conducted exhaustive research and analysis and met with a wide range of groups and individuals from a broad range of perspectives before issuing their reports to the White House on June 2. It is their work, and the ideas and opinions of the scores of people they consulted that provides the foundation for the President's Forest Plan for a Sustainable Economy and a Sustainable Environment.

FOREST MANAGEMENT

The President's Forest Management Plan offers an innovative new approach which uses key watersheds as its basic building blocks and offers new possibilities for environmental and scientific research through the creation of Adaptive Management Areas.

Recently, forest management proposals have been driven either by an approach based on protecting areas inhabited by specific species, such as the spotted owl or marbled murrelet, or, by an approach based on protecting a specific type of forest.

The President's plan offers a different approach, based on sound science and a commitment to existing law, which is built around identifying and protecting key watersheds and old-growth forests. Such an approach takes great steps to protect the region's drinking water and represents an obvious and essential step toward restoring a healthy salmon industry. It protects threatened species, such as the northern spotted owl and the marbled murrelet, scores of other species (including fish now considered "at risk" under the law), as well as the most valuable old growth forests.

Ten Adaptive Management Areas provide opportunities for federal, state and local officials, industry, community, and environmental organizations, tribes, and others to work together to develop innovative management approaches, such as the Applegate Project and the Douglas Project in Oregon and the Hayfork Adaptive Management Area in Northern California. These areas provide for intensive experimentation and innovation to demonstrate new ways to achieve ecological, economic, and social objectives and allow for local involvement. A rigorous monitoring and research program will ensure the development and analysis of scientific data to assess the effectiveness and impact of these approaches.

Key elements of the President's plan include:

- o Watersheds as the fundamental building block:
- o Reserve areas based on watersheds and old growth that include the most valuable old growth forests and designated conservation areas to protect specific species. Only very limited activities would be permitted in the reserves, including salvage and thinning where the primary objective of that salvage and thinning is to accelerate the development of old growth conditions.

- o Ten Adaptive Management Areas of 78,000 - 380,000 acres each for intensive ecological experimentation and social innovation to develop and demonstrate new ways to integrate ecological and economic objectives and allow for local involvement in defining the future;
- o The development of a new rule from the Fish and Wildlife Service to ease restrictions on timber harvest from certain non-federal lands (modifying what have been known as "owl circles"), possible because the President's plan improves management of federal lands; and, encouraging private companies to commit the timber released by these changes to processing in domestic mills;
- o Federal assistance to bring to market backlogged timber sales from Indian reservations.

The President will submit his forest management plan to the court and will do everything possible to resolve the legal challenges and lift the injunctions that have stopped timber sales so that both the Forest Service and the Bureau of Land Management can implement a sale planning and preparation program as quickly as possible. He is asking the Secretaries of Agriculture and Interior to take any other available actions consistent with our legal obligations to revive the timber sale program.

And, because the President believes the workers, businesses, and communities in the region need help as quickly as possible, the President is directing his Cabinet to work with all those who share his determination to resolve these issues in a fair and balanced way to develop the most effective means to implement this plan and move timber sales forward as quickly as possible.

Harvest levels in the President's plan take into account the fact that previous Forest Service management plans have significantly overestimated the amount of timber available for harvest every year, presenting unrealistically high harvest levels that cannot be sustained even under existing forest management plans. The President's plan provides for a sustainable timber harvest of 1.2 billion board feet annually on the spotted owl forests. In addition, the expected release of sales stopped by injunction, steps to move timber from Indian lands, and other measures are expected to increase that figure as the program is implemented.

The President's Forest Plan focuses on management strategies to resolve the long-standing court challenges over management of the spotted owl and old growth forests on the west side of the Cascade Mountains. Management of east side forests will need to focus on restoring the health of forest ecosystems impacted by poor management practices of the past.

The President is directing the Forest Service to develop a scientifically sound and ecosystem-based strategy for management of the east side forests. This strategy should be based on the forest health study recently completed by agency scientists as well as other studies. Consistent with this strategy, the President also is directing the agency to accelerate efforts to prepare timber sales to harvest dead and dying timber on the east side.

ECONOMIC DEVELOPMENT

Unlike his predecessors, President Clinton recognizes that the Northwest forest crisis involves important economic and social as well as environmental concerns. Recognizing the importance of timber and forests to the economy and jobs in the region is central to the President's Forest Plan for a Sustainable Economy and a Sustainable Environment.

The President's plan will provide immediate and critical support for economic adjustment and diversification in the region, including expanded funding for business development, economic planning, infrastructure development and worker retraining to help build a foundation for long-term economic strength and environmental health. The President's plan will help existing companies grow and attract new businesses. It will add more jobs for the timber harvested by encouraging value added manufacturing and help those workers and those communities who rely on a future in wood.

The plan will provide \$270 million in new funding for FY 1994 -- \$1.2 billion over five years -- including a new Northwest Economic Adjustment Fund. While estimates indicate that the forest plan will directly impact 6,000 jobs, in 1994, the plan would create more than 8,000 jobs and fund 5,400 additional retraining opportunities.

Key elements of the President's plan include:

- o For workers and families, increased funding under the Job Training Partnership Act for job search assistance, retraining, and relocation; overall, a 110 percent increase in funding from \$20.2 million to \$42 million;
- o A three-part strategy for business development in the Pacific Northwest and Northern California, including improved access to capital, expanded technical assistance, and enhanced access to domestic and international markets; overall a 47 percent increase in funding from \$163 million to \$239.7 million;
- o For communities, established levels of financial assistance to timber counties, replacing the roller coaster of payments tied to timber harvests with a reliable schedule of payments, creating a sound fiscal environment for county governments, businesses, and financial institutions; strengthening community capacity to plan for economic development and diversification, and improving the infrastructure needed for such development through Community Development Block Grant lending, Rural Development Administration community facilities, and the RDA water/wastewater program; overall a 25 percent increase in funding from \$298.6 million to \$373.6 million;
- o To protect the environment and create jobs, investments in watershed maintenance, ecosystem restoration and research, environmental monitoring and forest stewardship, all of which will also improve water quality and increase salmon stocks to avoid listing of salmon species under the Endangered Species Act and to improve commercial fishing; in addition, forest stewardship will be expanded to help small landowners manage their forests; overall, a 19 percent increase in funding

from \$438.2 million to \$519.8 million.

o Support for the elimination of tax incentives for the export of raw logs; and, the President is directing his cabinet to study effective ways to make it more difficult for companies to avoid export limitations on raw logs.

o Directing his Cabinet to identify and implement, in a priority manner, the best ways to strengthen small businesses and secondary manufacturing in the wood products industry, including a review of increasing the supply of federal timber set aside for small businesses and possible preferences for bidders who contract for domestic secondary processing. The President also is directing his administration to encourage improved and effective community partnerships to bring together those with different perspectives on forest management. (Secondary manufacturing generates from four times to 25 times more jobs per billion board feet than primary manufacturing)

The Northwest Economic Adjustment Initiative would be implemented through an innovative partnership among state, local, and federal agencies, as well as community and business leaders, to help local families and workers caught in the middle of this crisis. The President is directing that federal agencies implement this innovative approach to economic adjustment by creating a unified management system that will bring the various agency efforts in each state together into a single team. This will coordinate the related activities of federal, state, and local agencies and provide a unified point of contact and procedures for workers, firms, and local communities.

The President's proposal, supported by Governor Barbara Roberts of Oregon and Governor Mike Lowry of Washington, represents a comprehensive experiment in "reinventing government" -- improving the way the government works to make it more responsive, more effective, and more efficient. The plan calls for replacing restrictions on the use of federal funds with performance-based measures, making new use of leveraged private resources, and creating new processes and institutions responsive to local needs and priorities.

The President's plan provides a substantial infusion of new federal assistance through innovative programs to both provide economic relief to timber communities as soon as possible and to encourage long-term economic development and diversification.

AGENCY COORDINATION

Too often in the past, different federal agencies have acted in isolation or even at cross purposes in managing federal forest lands in the Pacific Northwest and Northern California. Instead of working to confront existing problems, they have contributed to them, creating confusion and controversy. At the Forest Conference, President Clinton made clear "we will insist on collaboration, not confrontation."

Because of the President's clear direction to improve inter-agency coordination, an entire working group was created to focus on these issues. In addition, throughout this process, an inter-agency approach, involving the key federal agencies involved, has been in use. The implementation

of a new forest management strategy provides the ideal opportunity to correct past practices and improve inter-agency cooperation and, in the process, forest management.

The President's plan will improve inter-agency coordination by:

- o Creating a new focus for forest planning based on watersheds and "physiographic provinces" that base management on the unique ecology of each region;
- o Immediately creating a new inter-agency Geographic Information System data base to allow land management and resource agencies to coordinate their efforts in the collection and development of research and data;
- o Creating provincial-level teams that would develop analyses for physiographic provinces and particular watersheds. These teams would include the relevant federal agencies, state officials and tribes and, when individual watersheds are analyzed, the objective would be to involve all affected parties in discussions on biological, timber, community, and other needs. An Inter-agency Executive Committee would coordinate and provide direction for the work of the provincial teams;
- o Revising the consultation process under the Endangered Species Act to emphasize an integrated ecosystem approach. This would include the Fish and Wildlife Service and the National Marine Fisheries Service early in the process so that the views of these agencies can be made known when the land management agencies begin to develop their plans for a particular area, instead of later in the planning process as is now the case. It would also involve the use, where appropriate, of regional consultations.

CONCLUSION

The President's Forest Plan for a Sustainable Economy and a Sustainable Environment represents a comprehensive, innovative and balanced approach to the economic and environmental challenges facing the region. It is the result of extensive research, analysis, and cooperation among federal agencies and extensive discussions with a wide range of individuals and groups including business, labor, environmentalists, tribes, community groups, and Members of Congress. The President and his entire Administration intend to continue to seek the support and opinions of these groups to implement this plan and break the gridlock that has blocked progress on these issues.

As the President said at the close of the Forest Conference: "If we don't give up or give in to deadlock or divisiveness or despair, I think we can build a more prosperous and a more secure future for our communities and for our children." This Forest Plan is an important step toward that future.

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United States Office of Forestry and Economic Development

333 S.W. First Avenue, P.O. Box 3623, Portland, Oregon 97208-3623

May 11, 1995

*Filed
or 2:45 pm*

MEMORANDUM

To: Carol Rasco, Director, Domestic Policy Council

From: Tom Tuchmann, Director *Tom*

Subject: Briefing on Oregon's Natural Resource Economy and the President's Forest Plan

Thanks for the heads up on your visit to Oregon. I look forward to meeting you after hearing about all the great things your shop has been doing for the last couple years.

It's great that you are visiting and spending some time on the President's Forest Plan. Except for myself, few Administration officials have visited the State since the Plan was released nearly 2 years ago.

I have pulled together a small group of opinion leaders in the State to discuss the President's Forest Plan and the region's natural resource-dependent economy more generally (see attached list). I thought we could begin the meeting with each of the participants introducing themselves and giving a brief, 2- to 3-minute, statement about the following three points from their particular perspective:

- o What role do rural natural resource industries play in the State economy.
- o What are the real and perceived impacts of the Administration's policies on the State's economy.
- o How should the Administration focus its efforts over the next 18 months.

Please let me know if there is an alternative set of questions that would be more useful to you in your efforts. I would like to make sure the participants are prepared to provide you with the information you need.

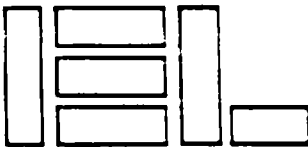
The remaining 30 to 40 minutes could be spent discussing your follow-up questions.

Attached are a number of documents that should provide you with a better understanding of the President's Forest Plan and the region's economy. They are arranged in order of importance for your review. I've also stuck in a copy of my "authorizing memo" so you know what this office is up to.

Meeting - Monday Afternoon

- Call Dwight re doc meeting

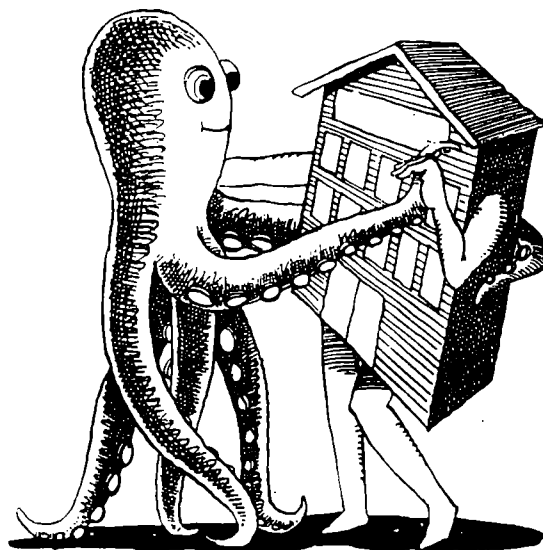
- Bill Scott
- Closures / Announcements of layoffs → Disturbed Workers will be a key issue for Eastern Oregon
- High Tech will overtake wood products
- Economic Recovery → W. Oregon → people have worked w/ economic adjustment enough
- "Lower Expectations and Deliver"
- Oregon economy in aggregate is strong and growing
- A lot of the policies on natural resources have an uneven ~~size of what is~~ impact on different parts of the country
- People desire to get past polarity
- "The President needs to take credit for ^{doing} what we said he was going to do."
- You have to make sure that the timber moves.
- On the coast there is a potential for a recovery strategy like we have never seen before.
- Whole different set of dynamics
- "The impacts are falling so unevenly."
- There has been NO action. There has been no timber sell. Somewhere, something needs to happen.
- URBAN / RURAL DIVISION
- when you withdraw natural Resources from the ~~center~~ economy means a re-emphasis on urban areas



THE INSTITUTE FOR EDUCATIONAL LEADERSHIP, INC.

THE INTERGOVERNMENTAL/INTERAGENCY POLICY EXCHANGE

The educational, health, social services and employment needs of children and families are intricately intertwined. The same child who is at risk of school failure is frequently also at risk of poor health. A child who is homeless has difficulty completing his or her homework. A child who lives among drugs and violence at night is ill-prepared to flourish academically during the day. A three-pound baby in neonatal intensive care today is likely to be a special education student tomorrow.



Collaboration is like dancing with an octopus, with each agency or organization a "tentacle."

While policy makers are increasingly recognizing these relationships, the policy landscape does not reflect this recognition. At the same time that many communities are struggling to make services more comprehensive and coordinated, state and federal legislative committees, executive branch agencies, interest groups, and postsecondary preparatory programs are overwhelmingly organized by narrow service sectors—education, health, social services, juvenile justice, labor and so forth.

The Intergovernmental/Interagency Policy Exchange is a nonpartisan mechanism to help reshape the policy landscape to reflect the current realities of children, families and communities. Its aim is to create a forum where policy makers and practitioners can learn about cross-cutting and cutting-edge ideas so that they can lead the way to systemic change.



The inter-connected activities of the Exchange are designed to be a catalyst for the development of more thoughtful policies that foster collaboration at the local, state and national levels—as well as to explore the interactions among policies at different levels.

- Through ***national and state seminars***, the Exchange will engage key policy makers across sectors in dialogues about effective and efficient ways to provide comprehensive services to children and families.
- Through ***field visits and retreats***, the Exchange will help national leaders explore innovative strategies, provide reality checks from the state and local levels, and develop the personal relationships that can underpin stronger policy networks among sectors and disciplines.
- Through a new publication, ***The Octopus Times***, the Exchange will provide timely "one-stop-shopping" on policy issues of interagency and intergovernmental collaboration.
- Through ***policy briefs***, the Exchange will synthesize—in a jargon-free style that bridges agency and disciplinary boundaries—key information and issues about collaboration among education and other sectors.

For further information, contact Margaret Dunkle, Director of the Policy Exchange, at the Institute for Educational Leadership.



EVALUATION

Site Visit to Oregon
April 19-22, 1995

What was the most significant, important or surprising part of the site visit?

Knowing what you know now, what do you think should be done to make programs and policies for children and families work better?

1.

2.

3.

When you're back at your job, will you do anything differently as a result of this site visit? Yes _____ No _____

If yes, what?

Do you expect to work more or less with other site visit participants in the future?

Please elaborate _____

Please give us suggestions for future site visits and seminars—and let us know the names of other people we should invite to future activities.

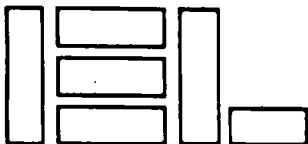
On a scale from 1 to 10 (with 1 being awful and 10 being great), how would you rate this site visit? _____

Why? _____

If you wish, identify your agency or committee, or add any additional comments.

Thanks for your comments!

**Please give this form to a staff person or mail or fax it
to the IEL Policy Exchange.**



PARTICIPANTS

SITE VISIT TO OREGON

APRIL 19-22, 1995

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Withdrawal/Redaction Marker

Clinton Library

DOCUMENT NO. AND TYPE	SUBJECT/TITLE	DATE	RESTRICTION
001. list	Site visit to Oregon participants list (partial) (1 page)	04/19- 22/1995	P6/b(6)

COLLECTION:

Clinton Presidential Records
Domestic Policy Council
Gaynor McCown (Subject Files)
OA/Box Number: 7322

FOLDER TITLE:

[Oregon] [1]

2011-0255-S

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RESTRICTION CODES

Presidential Records Act - [44 U.S.C. 2204(a)]

Freedom of Information Act - [5 U.S.C. 552(b)]

P1 National Security Classified Information [(a)(1) of the PRA]
P2 Relating to the appointment to Federal office [(a)(2) of the PRA]
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b(8) Release would disclose information concerning the regulation of financial institutions [(b)(8) of the FOIA]
b(9) Release would disclose geological or geophysical information concerning wells [(b)(9) of the FOIA]

C. Closed in accordance with restrictions contained in donor's deed of gift.

PRM. Personal record misfile defined in accordance with 44 U.S.C. 2201(3).

RR. Document will be reviewed upon request.

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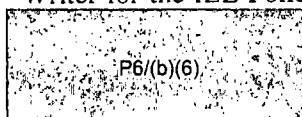
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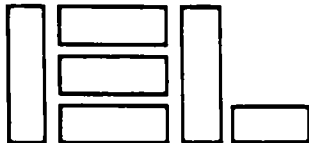
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RESOURCE MATERIALS

OREGON SITE VISIT

APRIL 19-22, 1995

OVERVIEW

Agenda

Small Group Assignments

1—Wednesday p.m., **Field Work/Home Visits**

2—Thursday a.m., **Understanding the Oregon Benchmarks**

3—Thursday p.m., **Site Visits**

4—Friday p.m., **Symptom or Solution?** Learning Larger Lessons from Oregon
Waivers

Participants List

Questions & Issues Raised by Participants

Resource People

"Tour Guides" for FieldWork/Home Visits, Wednesday, April 19, 1995

IEL Policy Exchange Flyer

Evaluation

Blank Labels (to label your luggage, if you need them)

ABOUT OREGON

Portland Map

Portland Oregon Area Attractions

The Portland Book—The Official Visitors Guide, 1995 Edition

"Vera Katz and Beverly Stein—The Friendly Art of Collaboration,"
by Ellen Perlman, *Governing*, December 1994

Oregon Values & Beliefs Survey, May 1993, Oregon Business Council

Measuring Our Commitment to Oregon's Children and Families, 1994,
Children First for Oregon

Report Card, 1993, Children First for Oregon

Report Card, 1994, Children First for Oregon

"Oregon Earns Lowly C- in Report," *The Oregonian*, October 4, 1994

Children First for Oregon (Newsletter), Fall 1994

THE OREGON BENCHMARKS & THE OREGON OPTION

Oregon Benchmarks: What Are They? and History

A Case Profile of Oregon's Benchmarks, by Ann Lewis, August 1994

Oregon Benchmarks: Standards for Measuring Statewide Progress and

Institutional Performance, Report to the 1995 Legislature, Oregon Progress Board, December 1994

The Oregon Option

Memorandum of Understanding, December 1994

Summary of Proposal

Project Status Report, December 5, 1994

Benchmarks to Initiate Project, by Cluster and with Target Groups

OREGON REFORMS INITIATIVES

An Investment Opportunity: Redesigning Oregon's Public Assistance System to Reduce Poverty by Placing More Oregonians in Jobs, Oregon Progress

Board and Workforce Quality Council, March 28, 1995 (Welfare Reform)

Do You Have Questions About School Improvement? Here Are Some Answers

You Can Count On, Oregon Department of Education, Oregon

21st Century Schools

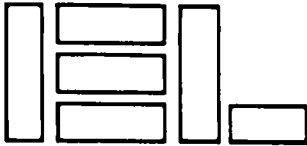
Oregon Commission on Children and Families, House Bill 2004, as enacted, 1993

(Also see the *Primer on Oregon Waivers* for additional information about health care reform and welfare reform.)

OREGON WAIVERS

A Primer on Oregon Waivers from Federal Health, Education and Welfare Laws and Regulations, The IEL Policy Exchange, April 1995

Worksheet—Small Group Work with Waivers



Agenda IEL Policy Exchange Site Visit to Oregon

April 19-22, 1995

Wednesday, April 19, 1995

- 7:00 a.m. Participants meet at Washington National Airport, American Airlines check-in counter
- 7:47 a.m. Leave Washington National Airport, arriving in Portland at 12:48 p.m.
- 2:00 p.m. Field Work
Site visit participants, accompanied by a "Tour Guide," will individually visit Oregon families and participants in federal, state and local programs. Participants will meet their "Tour Guides" and leave from Fred Meyer Starbucks Cafe, 3030 NE Weidler (Hollywood District), Portland (503) 284-9907
- 4:30 p.m. Debriefing on the Field Work
World Trade Center, Mezzanine 2, 3, 4
This session will include both participants and their "Tour Guides."
- 5:45 p.m. Break
- 7:00 p.m. Dinner with Members of the Oregon Progress Board and the Portland-Multnomah Progress Board
The Benson Hotel, Cambridge Room

8:15 p.m. Oregon: The Players and the Context

The Honorable Beverly Stein
Chair, Board of Commissioners
Multnomah County, Oregon

The Honorable Randy Franke
Chair, Board of Commissioners, Marion County *and*
President, National Association of Counties

9:00 p.m. Free Time and Networking

Thursday, April 20, 1995

- 7:00 a.m. Breakfast and Networking
The Benson Hotel, the Little London Room
Be sure to allow time to order breakfast off the menu and get to the World Trade Center, which is about a 15 minute walk from the Benson.
- 8:00 a.m. Understanding the Oregon Benchmarks
World Trade Center, Mezzanine 2, 3, 4

Duncan Wyse
Executive Director
Oregon Progress Board
- 12:00 noon Lunch
- 1:00 p.m. Local Site Visits
Each participant will participate in one in-depth site visit—touring the facility, getting an overview of programs and services, talking with the customer (client, family, student, etc.), and having a debriefing with staff.
- #1—Steps to Success at Mount Hood Community College (Provides comprehensive services to AFDC JOBS program participants)
Contact: Nan Poppy, Director, Steps to Success, Mount Hood Community College, 14030 NE Sacramento, Portland, Oregon 97230 (503) 256-0432
- #2—Multnomah County Southeast Health Clinic (An Oregon Health Plan managed care organization that provides "seamless" services to low-income families)
Contact: Ardys Craghead, Clinic Manager, 3653 SE 34th, Portland, Oregon 97202 (503) 248-3520
- #3—School-to-Work Program, Partners in Vocational Opportunity Training (PIVOT) Teen Parent Program (Provides educational, health and other services to pregnant and parenting teens)
Contact: Robyn Moore, Transition Specialist, PIVOT Teen Pregnancy and Parenting Program, 2508 NE Everett, Portland, Oregon 97232 (503) 280-6170
- 5:00 p.m. Break, Networking, Free Time
The Alexis Restaurant is about a 10 minute walk from the Benson.
- 6:00 p.m. Dinner with Elected Officials
Alexis Restaurant, 215 West Burnside, Portland, Oregon 97209
(503)224-8577

Friday, April 21, 1995

7:30 a.m. Breakfast and Networking
The Benson Hotel, the Little London Room
Be sure to allow time to order breakfast off the menu and get to the World Trade Center, which is about a 15 minute walk from the Benson.

8:45 a.m. School Reform in Oregon
World Trade Center, Mezzanine 2, 3, 4

Norma Paulus
Superintendent
Oregon Department of Education

The Honorable Vera Katz
Mayor
City of Portland

Jack Bierwirth
Superintendent
Portland Public Schools

Joanne Flint
Assistant Superintendent
Oregon Department of Education

10:00 a.m. Break

10:15 a.m. The Politics and Practice of the Oregon Commission on Children
World Trade Center, Mezzanine 2, 3, 4

Lennie Bjornsen
Director
Clackamas County Commission on Children and Families

Sue Cameron
Director
Tillamook County Health Department

11:45 p.m. Lunch

12:15 p.m. Health Care Reform in Oregon

Mark Gibson
Policy Advisor to the Governor
for Health Care, Labor and Housing

Lynn Read
Project Manager
Office of Medical Assistance Programs
Oregon Department of Human Resources

Ellen Pinney
Director
Oregon Health Action Campaign

John Santa
Senior Vice President for Medical Affairs
Blue Cross Blue Shield of Oregon

Jeff Davis
Administrator
Marion County Health Department

1:15 p.m. Break

1:30 p.m. Solution or Symptom?—Learning Larger Lessons from
Oregon's Many Waivers from Federal Statutes
This will be an interactive session where participants will work in small groups.

1:30 p.m. Introduction

1:45 p.m. Hands-on Work with Waivers

Each team has two tasks:

The first task is to understand the waiver.

*The second task is to identify lessons learned from this waiver—either
lessons specific to "your" waiver or more general lesson.*

3:00 p.m. Debriefing and Reporting out on Lessons Learned about Waivers

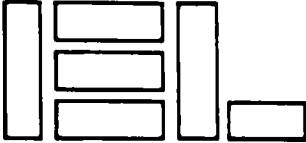
4:30 p.m. Announcements, Dinner Arrangements

6:00 p.m. (or so) "Take a Fed to Dinner"

*Our Oregon hosts are arranging small dinner groups so that you can experience Oregon
hospitality first-hand.*

Saturday, April 22, 1995
World Trade Center
Mezzanine 2, 3, 4

- 7:30 a.m. Breakfast and Networking
The Benson Hotel, the Little London Room
If you want breakfast, the Little London Room is available. We'll be having a brunch at Multnomah Falls at 10:00 p.m.
- 8:00 a.m. Leave Benson for Multnomah Falls
Please check out of your rooms before 8:00 a.m. and have your bags with you. We will not return to the hotel before going to the airport.
- 9:00 a.m. Multnomah Falls—Free Time . . .
- 10:00 a.m. Brunch
Multnomah Falls Lodge, Doyle Room
- 10:30 a.m. Debriefing and Reflections: What Have We Learned? How Will We Incorporate This Learning into Our Work?
- 11:30 a.m. Leave Multnomah Falls for the Portland Airport
- 1:45 p.m. Leave Portland Airport, Arriving at Washington National Airport at 11:54 p.m.
We'll give each person flying back to Washington a box lunch for the trip.



THE INSTITUTE FOR EDUCATIONAL LEADERSHIP, INC.

Small Group Assignments

- #1 Field Work/Home Visits -Wednesday p.m.**
- #2 Understanding the Oregon Benchmarks - Thursday a.m.**
- #3 Site Visits - Thursday p.m.**
- #4 Hands on Work for Waivers - Friday p.m.**

#1 - Field Work/Home Visits

Wednesday p.m.

Group Assignments

Site Visit Participants

Valerie Baldwin - Betty Schallenberger, Multnomah County Child and Adolescent Mental Health Program, visit to Eastwind Service Center to talk with a family

Ira Barbell - no tour

Karen Belding - no tour

Wendy Cramer -

Barbara Dyer - not in with site visit yet

Cindy Fagnoni - Bennie Bogan, The Private Industry Council, site visit to talk with "crew" of young people working outdoors (or inside if it rains a lot)

Mike Fishman - Debbie Stone, Steps to Success, family visit

Sue Hildick - Gary Davidson, Adult and Family Services, family visit

John Kamensky - Michael Magnum, Northeast Workforce Center, visit to a person at his/her worksite who has been helped through the local door-to-door survey

Stephen Kohashi - Peigi Huseby, Community Health Nurse, family visit

Darla Letourneau - Susie Silva-Strommer, Multnomah County Child and Adolescent Mental Health, family visit

Peter Martinez - Diane Feldt, North Portland Youth and Family, visit with families at service site

Jennifer Miller - Dari Kelly, Steps to Success, family visit and visit to Steps to Success site

Linda Morra - Jeannette Embree, Steps to Success, visit a family from the learning center

Carla Nuxoll - no tour

Mark Popovich - Maxine Thompson, Leaders Roundtable, visit with family and students

Elsperth Revere - Pam Ballentine, Multnomah County Alcohol & Drug Touchstone Project, visit with family and school

Martha Riche - Brent Matthews, Multnomah County Office of Child and Adolescent Mental Health - Partners Project, family visit

Jane Ross - Diane Jones, Steps to Success, family visit

Ralph Smith - Sue Winegar, Community Health Nurse, family visit

Donna Stark - no tour

Mike Stephens - Paula Jones, Roosevelt Community Family Resource Center, family visit

Mike Stoker - Larry Pouncil, Northeast Workforce Center, visit to a person at his/her worksite who was helped through the door-to-door local survey

IEL Staff

Margaret Dunkle - Kate Dins and Donna Peak Insights Teen Parent Program, family visit

Anne Lewis - Kate Dins and Donna Peak Insights Teen Parent Program, family visit

#2 - Understanding the Oregon Benchmarks

Thursday a.m.

Group Assignments

Site Visit Participants

Valerie Baldwin - Early Childhood and Health
Ira Barbell - Early Childhood and Health
✓ Karen Belding - Family Stability
Wendy Cramer - Family Stability
Barbara Dyer - none
Cindy Fagnoni - Workforce Development
Mike Fishman - Workforce Development
Sue Hildick - Family Stability
John Kamensky - Early Childhood and Health
Stephen Kohashi - Family Stability
Darla Letourneau - Early Childhood and Health
Peter Martinez - Family Stability
Jennifer Miller - Workforce Development
Linda Morra - Early Childhood and Health
Carla Nuxell - none
Mark Popovich - Family Stability, **Facilitator**
Elsperth Revere - Workforce Development
Martha Riche - Family Stability
Jane Ross - Workforce Development
Ralph Smith - Early Childhood and Health
Donna Stark - Early Childhood and Health
Mike Stephens - Family Stability
Mike Stoker - Workforce Development

Oregon Staff

Chuck Diamond - Workforce Development, **Facilitator**
Tim Houchen - Early Childhood and Health
Pam Preus-Braly - Family Stability
Connie Revel - Workforce Development
Duncan Wyse - Early Childhood and Health, **Facilitator**

IEL Staff

Margaret Dunkle - Workforce Development
Anne Lewis - Early Childhood and Health
Jane Dewey - Early Childhood and Health
Scott Gates - Family Stability

#3 - Site Visits

Thursday p.m.

Group Assignments

Site Visit Participants

Valerie Baldwin - #2 Southeast Health Clinic

Ira Barbell - none

Karen Belding - #1 Steps to Success

Wendy Cramer - #2 Southeast Health Clinic

Barbara Dyer - none

Cindy Fagnoni - #3 PIVOT Program

Mike Fishman - #3 PIVOT Program

Sue Hildick - #1 Steps to Success

John Kamensky - #3 PIVOT Program

Stephen Kohashi - #2 Southeast Health Clinic

Darla Letourneau - #3 PIVOT Program

Peter Martinez - #1 Steps to Success

Jennifer Miller - #2 Southeast Health Clinic

Linda Morra - #3 PIVOT Program

Carla Nuxoll - none

Mark Popovich - #1 Steps to Success

Elsperth Revere - #1 Steps to Success

Martha Riche - #1 Steps to Success

Jane Ross - #3 PIVOT Program

Donna Stark - none

Ralph Smith - #2 Southeast Health Clinic

Mike Stephens - #3 PIVOT Program

Mike Stoker - #2 Southeast Health Clinic

IEL Staff

Margaret Dunkle - #1 Steps to Success

Anne Lewis - #2 Southeast Health Clinic

Jane Dewey - See if space and time

Scott Gates - See if space and time

#4 - Hands on Work for Waivers

Friday p.m.

Group Assignments

Site Visit Participants

Valerie Baldwin - Education
Ira Barbell - Seniors
Karen Belding - Seniors
Wendy Cramer - Welfare
Barbara Dyer - Health, **Facilitator**
Cindy Fagnoni - Seniors
Mike Fishman - Health
Sue Hildick - Seniors
John Kamensky - Education
Stephen Kohashi - Education
Darla Letourneau - Health
Peter Martinez - Education
Jennifer Miller - Seniors
Linda Morra - Health
Carla Nuxoll - Welfare
Mark Popovich - Education
Elsperth Revere - Welfare
Martha Riche - Health
Jane Ross - Education
Ralph Smith - Welfare
Donna Stark - Health
Mike Stephens - Health
Mike Stoker - Welfare

Oregon Staff

Chuck Diamond - Seniors, **Facilitator**
Duncan Wyse - Welfare, **Facilitator**
James Wilson - Seniors Expert
Susan Dietsche - ask Susan
Lynn Read - Health Expert
Bob Labbe - ask Bob what he prefers
Stephen Minnich - Welfare Expert
Jim Neeley - ask Jim what he prefers
Holly Miles - Education Expert
Connie Revell - Education

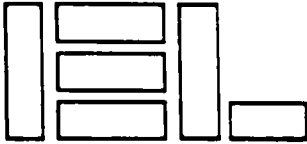
Randy Franke - Health
Pam Preus-Braly - Welfare

IEL Staff

Margaret Dunkle - Seniors
Anne Lewis - Welfare
Jane Dewey - Education, **Facilitator**
Scott Gates - Health

Additional Oregon Staff

Gary Blackmer - Education
Dennis Cole - Seniors
Bill Farver - Health
Norm Monroe - Welfare
Gary Oxman - Education
Dick Tracey - Welfare
Rosie Williams - Seniors



QUESTIONS
RAISED BY PARTICIPANTS

SITE VISIT TO OREGON

April 19-22, 1995

On the Response Form for the Oregon site visit, the Policy Exchange asked what three questions participants would most like for the visit to address. In all, participants raised eight overarching questions:

How Were the Benchmarks Developed? What Is a Performance Measure?

What Is the Role of Data and Tracking Funds in the Benchmarking Process?

Can You Tell Me More About the "Oregon Option"?

At the Local as Well as State Levels . . . What Difference Do Benchmarks Make?

What Should Be the Federal Role? the State Role?

How Do Oregon Reform Pieces Fit Together—and with the Benchmarks?

How Can We Develop a System That Has Accountability for Results?

What Are the Lessons Learned by and from Oregon's Experience?

The following pages provide more detail, giving the specific responses received from site visit participants.

How Were the Benchmarks Developed? What Is a Performance Measure?

What kinds of performance indicators have been developed by Oregon?

How were the Benchmarks developed? Who participated? What were the incentives and the obstacles?

What barriers and complexities did state officials encounter in developing and implementing these outcome measures?

How did Oregon decide what to measure and how to measure it? I am especially interested in data issues.

How are program outcomes and outputs measured?

What Is the Role of Data and Tracking Funds in the Benchmarking Process?

How are costs or expenditures accumulated and recorded? Are all costs captured or only direct costs? Is a program-unit cost calculated?

What are the data needs not currently being met?

Would the absence of state and local data from the federal government, such as the census, affect Oregon's efforts?

How do data serve to advance the project? How do people use data? How important is it?

How do Oregon's legislators and other officials know whether the programs are actually working? In particular, what information is provided to them that distinguishes between net impacts and gross outcomes?

Can You Tell Me More About the "Oregon Option"?

Explain the origin of the Oregon Option. What is the status? What restrictions are being placed on the state by HHS?

How were decisions made regarding which federal programs to merge, and how to merge federal and state programs? What roadblocks remain?

What specific benchmarks or performance measures will the Oregon Option effort focus on? What accountability system or approach will it be linked to?

How can the Oregon Option effort directly improve the lives and prospects of the people and communities in Oregon?

At the Local as Well as State Levels . . . What Difference Do Benchmarks Make?

How have the benchmarks affected or improved services? supports for youth?

How do we better integrate services for real people?

How does consolidation work at the ground level?

Has the coordination of services changed the basic structures of the individual agencies?

What evidence is there that coordinated services is better service?

What do the data on program outcomes and efficiency show?

What is the budgetary impact (i.e., savings and cost avoidance) of Oregon's programs?

Has the coordination of services cut the cost of the total service delivery of all agencies combined?

How do state decision makers (the legislature and the Governor) deal with performance measures?

What kinds of funding decisions are being based on performance measures?

What Should Be the Federal Role? the State Role?

How do state and local officials view the current debate on New Federalism and sorting out the roles?

Do state and local players have specific waiver requests of the federal government or do they simply like the idea of flexibility? (We think technical assistance is greatly needed to help identify areas where waivers might make a real difference.)

How might regional needs be better met through flexibility options at the federal level?

How Do Oregon Reform Pieces Fit Together—and with the Benchmarks?

What is the role of "education reform" and Goals 2000 in improving student performance?

What is the controversy on "standards" in education reform?

What is the role of housing assistance in Oregon's programs?

How do the Benchmarks relate to crime prevention?

I want to learn about the willingness of the state to undertake broad-based health reform.

What outcome measures has Oregon developed to assess whether AFDC recipients are successfully moving from welfare to work?

How Can We Develop a System That Has Accountability for Results?

Can Congress step back from itself in order to explore in earnest a results-driven intergovernmental system?

If performance goals are not met, what is the appropriate enforcement tool? Who should enforce—the federal government or state government?

What Are the Lessons Learned by and from Oregon's Experience?

What is being "learned" through the Oregon Option effort that is translatable into federal policy- and program- and systems-change?

What "lessons learned" would state officials offer to other states that plan to develop outcome measures for their welfare-to-work program?

Are other states equipped and motivated enough to do something similar to Oregon's Benchmarks?

How do we reconcile the Government Performance and Results Act, the Contract with America, the National Performance Review and the approach taken in Oregon?

Would Oregon prefer a clean block grant rather than tinkering with state flexibility?

How can strategic planning at the state level, implemented through the Benchmarks program as Oregon does, influence the allocation of federal resources? For example, is it possible to weight a federal formula to give extra consideration to a state which is trying to align its local, state and federal dollars around a specific benchmark?

How can the federal government structure a statute so that a state/local government maintains maximum flexibility while encouraging the various state agencies to work together voluntarily? For example, can state-chartered Public Housing Authorities work together with state welfare agencies to provide social services and job-opportunity training to low-income families living in public housing?



"Tour Guides" for FieldWork/Home Visits
Wednesday, April 19, 1995

Urban League of Portland

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Linea Rein

Hispanic Youth Diversion
Specialist
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Larry Clayton

Assistant Director
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Community Health Nurses

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(503) 248-3501 Fax

Sue Winegar

Community Health Nurse
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N/NE Community Project

Michael Mangum

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(503)288-5049 Fax

Larry Pouncil

Client Advocate
Northeast Workforce Center
Targeted Neighborhood Project
Portland, OR 97217
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(503)288-4370 Fax

Community Pride

Bennie Bogan
Youth Program Supervisor
Youth Employment Institute,
The Private Industry Council
1704 NE 26th
Portland, OR 97212
(503) 280-1058
(503) 280-2801

Touchstone

Pam Ballentine
Family Intervention Specialist
Multnomah County Alcohol and
Drug Touchstone
421 SW 5th
5th Floor
Portland, OR
(503) 280-5832
(503) 248-3036

Partners Project

Brent Matthews
Managed Care Coordinator
Partners Project
Multnomah County Office of
Child and Adolescent Mental
Health
426 SW Stark, 7th Floor
Portland, OR 97204
(503) 248-3999 ex. 4050
(503) 248-3328

Kaleidoscope Program

Betty Schallberger
Mental Health Consultant
Multnomah County Child and
Adolescent Mental Health
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Portland, OR 97204
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(503) 248-3328

Susie Silva-Strommer
Mental Health Consultant
Multnomah County Child and
Adolescent Mental Health
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North Portland Youth and Family
Center (Family Service Center)

Diane Feldt
Director
North Portland Youth and
Family Center
Delaunay Family of Services
7704 North Hereford
Portland, OR 97203
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(503) 286-8389 Fax

Roosevelt Community Family
Service Center

Paula Jones
Family Advocate
Roosevelt Community Family
Service Center
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Portland, OR 97203
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(503) 280-5663 Fax

Roosevelt Renaissance 2000 Program

Maxine Thompson
Coordinator
Leaders Roundtable
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(503) 228-0349 Fax

Insights Teen Parent Program

Donna Peak
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Oregon Department of Human
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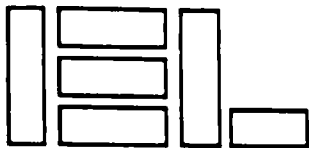
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Oregon Site Visit
April 19-22, 1995

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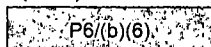
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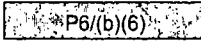
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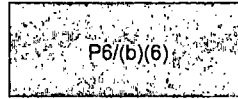
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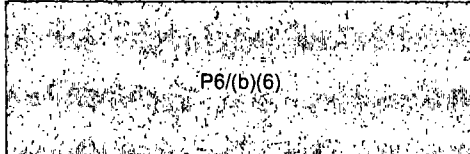
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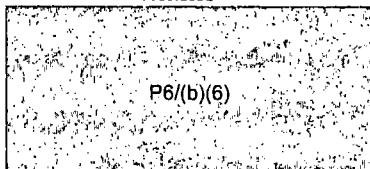
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Oregon earns lowly C- in report

Children First for Oregon releases its third annual report card on the state's performance in providing for the needs of children and families

By NANCY MAYER

of The Oregonian staff

Kids are expected to bring home good grades, but the state is barely squeaking by with a C-minus when it comes to serving the needs of children and families.

That's the conclusion of the third annual report card released Monday by Children First for Oregon. The private nonprofit advocacy group says the state is falling far short of reaching its own Oregon Benchmarks goals for improving the way it handles such issues as spousal abuse, child death and teen pregnancy.

The group measured five areas against those state goals. It gave the state a D-plus for children's safety, a D-plus for teen years, a C-plus for early education, a C for education and a C-minus for investing in families.

"There's a gap between what we say about kids and how important we say they are and what we do about it," said William Weismann, executive director of Children First for Oregon.

Gov. Barbara Roberts said she wasn't surprised by the results.

"We know we have some serious needs for children that are quite frankly underfunded in Oregon," she said.

Kevin W. Concannon, director of the Oregon Department of Human Resources, said he agreed with the overall grade but wished the report card would reflect areas that are improving, such as pregnant teens who return to high school after the births of their babies and people leaving welfare for work.

He also wished the report card would more clearly spell out problems that are worsening, such as serious juvenile crime.

In addition, Concannon said if 1993 figures had been used when calculating grades for such areas as immunizations, infant mortality, child death rates and prenatal care, the results would have reflected improvements in the past year. Weismann said the group used the most current data available from the state to compile its report card.

"To be sure, some areas of children's lives have worsened, such as juvenile crime, and some have improved, such as prenatal care and infant mortality," Concannon said, citing the Oregon Health Plan and prenatal care programs as helping Oregon's children.

At any rate, the report card showed that Oregon would not meet its goals for children by 2000 — if major steps are not taken now.

Roberts, interviewed last week before leaving for Europe, partially blamed budget shortfalls because of Measure 5 property tax limitation.

"You cannot serve children if you can't fund programs," the governor said. "If children are a priority, we have to start making wise decisions — not just in government but at the ballot box."

Children First also praised several community programs that are making a positive impact on the report card, including

the statewide Start Making a Reader Today (Smart) reading program; the Oregon Preschool Immunization Consortium; Multnomah County's Gang Influenced Female Team (Gift), which supports young women leaving the gang lifestyle; and West Albany High School, which dramatically lowered its school dropout rate in a single year.

Here is an explanation of some of the report card's findings:

■ **Spousal abuse:** Area shelters served only 10 percent of the women who needed assistance. Calls to area domestic abuse hot lines increased 28 percent, with more than 64,000 people calling for help last year. That's a rate of 57 calls per 1,000 household. Oregon's 1995 benchmark is to have only 35 hot-line calls per 1,000.

■ **Head Start:** In 1993, only 29 percent — or 6,200 out of 21,400 eligible children — were enrolled in Head Start or a state-run prekindergarten program.

Oregon's 21st Century Reform Act sets the goal of having 50 percent of the eligible 3- and 4-year-olds enrolled by 1996 and all the eligible children into programs by 1998.

The current Head Start budget for 1993-95 is \$18.3 million, with the state paying about one-third and the federal government paying the rest. To reach the state's goals, the funding would have to increase in the 1995-97 budget to \$43.8 million to get to 50 percent of the eligible children by next year.

"We need leadership that will take a serious look at the budget and prioritize our funding according to Oregon's benchmarks, especially the urgent benchmark of children being ready to learn when they start school," said Dell Ford, Head Start collaboration specialist.

■ **Infant mortality:** Oregon is improving, and exceeded its benchmark of 7.1 deaths per 1,000 births by next year, according to the report.

To put the death rate in perspective, Japan has a rate of four deaths per 1,000 births; Sweden has a rate of six deaths per 1,000, and Niger has a death rate of 191 deaths per 1,000. Thirty-two countries have infant mortality rates of more than 100 deaths per 1,000 births, Weismann said.

■ **Immunizations:** This area received a plus mark, reflecting the work of a collaboration of more than 50 public and private organizations called the Oregon Preschool Immunization Consortium. The group began a statewide immunization campaign in May that has resulted in more than 6,000 children being immunized.

However, the benchmark is for 90 percent of Oregon's 2-year-olds to be immunized by 2000. The 1993 figure was 54 percent, indicating that nearly half of Oregon's children were not immunized against preventable childhood diseases.

■ **Teen years:** Concannon said he would have flunked Oregon in this area — not given it a D-plus — because juvenile crime is up 31 percent since 1989.

The report said there were 42,134 juvenile arrests in 1993, up 31 percent since 1989. The 1993 arrest rate was 53.3 arrests per 1,000 teens, while the 1995 goal is 35 arrests per 1,000.

WHERE TO HELP CHILDREN

To improve the lives of Oregon's children, everyone needs to help, from citizens to corporations, said Leticia Maldonado, president of Children First for Oregon. Maldonado urged all Oregonians to consider giving just an hour or more a week.

■ The Volunteer Center represents more than 260 agencies throughout the tri-county area. 222-1355.

■ Volunteer Bureau in Vancouver, Wash. (206) 694-6577.

■ United Way Volunteer Connection in Eugene (503) 683-8364.

■ Children First for Oregon (800) 544-0376.

■ Call your area United Way agency, local school or day-care center, church or children's agency.

1994 REPORT CARD

OVERALL GRADE: C -

	MARK	GRADE	COMMENTS
SAFETY:		D+	
• Child Abuse 1993 saw 10,948 confirmed incidents; 11 deaths.	n	<i>Cause for concern</i>	
• Spousal Abuse 28% increase in calls to hotlines from 1992-93; over 64,000 calls.	-		
• Serious Crimes 1993 saw 176,000 reports; serious crimes against people are up 19% from 1989-1993.	n		
• Child Death Rate 169 children age 1-14 died in 1992; rate went up for first time in 5 years	-		
EARLY CHILDHOOD:		C+	
• Pre-Natal Care 79% of pregnant women sought early pre-natal care in 1992; far short of 1995 state goal of 100%.	+	<i>Continued progress</i>	
• Infant Mortality 1992 saw 297 Oregon children die before their first birthdays; the rate was 7.1/1,000	+		
• Immunizations 54% of our 2 year-olds were on schedule in 1993; a 10% improvement over 1992.	+		
• Child Care 36% of providers met basic safety standards in 1993; a 57% increase over 1992.	+		
TEEN YEARS:		D+	
• Teen Pregnancy 2,913 young women age 10-17 became pregnant in 1992; a rate of 17.9/1,000.	+		
• Juvenile Arrests 42,134 juvenile arrests in 1993; total arrests are up 31% since 1989.	-		
• Substance Abuse The use of alcohol & tobacco by 8th graders is on the rise.	n		
• Suicide Attempts 40 suicide deaths and 685 attempts in 1992; attempt rate went up 17% from 1991.	-		

	MARK	GRADE	COMMENTS
EDUCATION:		C	
• Head Start Enrollment Only 29% of 1993's eligible 3 & 4 year-olds were served by federal/state programs.	-		
• Student Achievement 89% of 3rd graders proficient in reading; only 65% of 11th graders proficient in math (1992-93).	n		
• Professional-Technical Education 83 of 1991-92 high school students have significant involvement.	n		
• School Drop-Out 21.4% of students due to drop out over a 4-year period (1992-93).	n		
INVESTING IN FAMILIES:		C-	
• Poverty More than 110,000 Oregon children live in poverty; including nearly 20% of those under 6 years of age.	n	<i>Needs more attention</i>	
• Child Support 54% of 1992's child support due was actually paid to single-parent families.	+		
• Health Uninsured 15% of Oregon's children lack health insurance; only 37th best out of the 50 states (1992).	n		
• Housing 60% of renters pay more than 30% of income for housing.	n		

How Grades Were Determined:

The letter grades for the five categories, and overall, use a point system based on an objective analysis of each indicator for:

- (1) Trends over four years or more (if data are available), and
- (2) Comparison of the most recent year's data to the 1995 Oregon benchmark goal (two indicators did not have benchmarks).

Mark compares most recent data to prior year:	(+) : improvement	(i) : Incomplete data
	(-) : Condition worsening	(n) : No reportable change

VERA KATZ AND BEVERLY STEIN

The Friendly Art of Collaboration



Vera Katz and Beverly Stein: integrating city and county services.

The placement of chairs on the floor of the Oregon House of Representatives has much to do with the happy state of intergovernmental affairs in Portland and Multnomah County. When Vera Katz and Beverly Stein were state legislators in the early '90s, they sat next to each other. That proximity led to friendship, and they began to compare ideas and philosophies. They found much in common.

Then one of those odd coincidences of American politics occurred. Stein was elected chair of Multnomah County, and Katz was elected mayor of Portland, the county seat. The result has been an unusually fruitful experiment in local-government interjurisdictional cooperation.

They see an increasing need for that kind of cooperation, whether or not it flows from personal friendship. "Taxpayers have lost patience with turf battles and duplicated services," Stein said when she was sworn in last year. So, every two weeks, one will walk a block for a scheduled meeting in the

other's office. And in between those formal sessions, they find time to head to dinner together or talk. What have sprung from their meetings and conversations are intergovernmental partnerships and agreements on many fronts.

Katz and Stein are enamored with the concept of community benchmarking, a

process for setting priorities and standards for improving the social and economic health of their communities that holds their governments accountable for results. Both women had been working on their own benchmarking strategies when they realized the merits of focusing on them jointly and including businesses, community organizations and residents in the effort. That led to the formation last year of the Portland-Multnomah County Progress Board.

On another front, Katz, Stein and Governor Barbara Roberts have been meeting with federal officials, working to persuade them to let Oregon move ahead with a plan called the "Oregon Option." It would draw the federal and state governments into the results-oriented delivery of services at the local level. Oregon is calling for a reduction of federal micromanagement at the local level and for state and federal funds to be released from rigid spending categories.

Katz and Stein already have shown they can get governments to work together more effectively. This year they made a trade of 23 county sheriff's deputies, who were transformed into city police officers.

The personnel swap wasn't an easy sell in the law enforcement community. But it made sense to Stein, the catalyst for the

switch. Portland had been searching for trained officers to do community policing. At the same time, the city had been annexing county land and the area patrolled by the sheriff's department was shrinking. After some delicate negotiations, the city got to hire experienced officers, and the county freed up \$2 million to invest in the battle against juvenile crime.

The two governments also are collaborating to get money available through the new federal crime law. Since the

'We need to begin to eliminate jurisdictional barriers as much as we can.'

—Vera Katz

county does parole and probation but the city has the largest police department in the county, the two are inextricably linked. "We need to begin to eliminate jurisdictional barriers as much as we can," Katz says.

Under another new program, the two local governments are integrating a variety of city and county services in sites around the community. "People don't care who does what," Stein says. "They just want to get done what they need to get done, whether it's getting a permit or attending a literacy group."

—Ellen Perlman





Enrolled House Bill 2004

Introduced and printed pursuant to House Rule 13.01

CHAPTER

AN ACT

Relating to children; creating new provisions; amending ORS 169.090, 184.007, 326.615, 326.795, 336.168, 336.435, 339.195, 339.505, 417.315, 417.700, 418.653, 418.657, 418.658, 418.660 and 420.017 and section 44, chapter 33, Oregon Laws 1993 (Enrolled Senate Bill 257); repealing ORS 409.210, 409.620, 409.630, 417.330, 417.335, 417.364, 417.400, 417.405, 417.410, 417.415, 417.420, 417.425, 417.430, 417.435, 417.440, 417.445, 417.455, 417.475, 417.480, 417.485, 417.490, 417.500, 417.510 and 417.672 and sections 1 and 2, chapter _____, Oregon Laws 1993 (Enrolled Senate Bill 93); appropriating money; and declaring an emergency.

Be It Enacted by the People of the State of Oregon:

SECTION 1. Subject to the availability of funds therefor and the specific provisions of this Act, it is the purpose of this Act to:

(1) Authorize the State Commission on Children and Families to set statewide policies for services to children and families and to insure that state and federal funds for such services are available where the services are needed;

(2) Enable the boards of county commissioners and local commissions on children and families to supervise local services;

(3) Vest in local commissions on children and families the authority to distribute state and federal funds to purchase services to children and families in the local area and to supervise the development of the comprehensive local plan for services;

(4) Require comprehensive local planning for services to children and families to provide local services that are consistent with statewide policies and guidelines;

(5) Retain in the state the responsibility for funding of services to children and families through a combination of local, state and federal funding, including the leveraging of public and private funds available under this Act;

(6) Retain state supervision of child protection and other services that should be uniform throughout the state and that are necessarily the state's responsibility; and

(7) Provide continuing service during the transition from the current system of services to a local system of services so that no lapse in services will occur.

SECTION 1a. (1) It is the intent of the Legislative Assembly to enable families and communities to protect, nurture and realize the full physical, social, emotional, cognitive and cultural developmental potential of children in Oregon. Toward this end, the Legislative Assembly shall develop and implement a statewide system of services that is preventive, integrated in local communities and accessible to children and families and that focuses on promoting the wellness of Oregon's children.

(2) The service system shall be based on promoting the wellness of Oregon's children and families. The following values shall guide the design and implementation of this system:

(a) A commitment to children that ranks them as Oregon's first priority;

(b) A commitment to reducing the number of Oregon's children and families living in poverty;

(c) A commitment to equitable treatment of gender in both services and funding;

(d) A view that strengthening families is of paramount concern, but that child safety must come first if a conflict between the well-being of a child and the well-being of a family arises;

(e) A recognition of the central role of families as the best place for children to develop;

(f) A realization that good parenting skills are fundamental to a healthy society;

(g) A sensitivity to diversity that requires culturally competent services respectful of genders, cultures, orientations and disabilities;

(h) An offering of opportunities for children to develop self-worth and concern for others, and to reach their full potential;

(i) A fundamental assumption that children should be provided the means to attain safety and good health; and

(j) A commitment to early detection and treatment of families at risk for child abuse and neglect.

(3) The service system shall emphasize:

(a) Services designed to identify risks and nurture potential at the earliest time in a child's life;

(b) Services designed to respond to and reduce risks at the earliest possible point of detection;

(c) A comprehensive continuum of services such as prevention, early intervention and treatment for children in all age groups;

(d) The realization that funding one age group or gender of children at the expense of another is destructive of the wellness of children; and

(e) That maintenance and enhancement of treatment services and augmentation of preventive services are paramount to the effective delivery of services to children and families.

(4) The service system must begin at the local level, through cooperation and integration of all local and state providers, treat the whole person and be built on the strengths and natural supports of neighborhoods and communities.

SECTION 2. The characteristics of the service system developed and implemented under this Act are that the system:

(1) Is nonstigmatizing;

(2) Is available and accessible when needed and is based on the perspective of children and families and, whenever possible, allows families to design their own service programs, based on assessment of their needs and their solutions and resources for change;

(3) Is outcome-oriented;

(4) Is integrated;

(5) Recognizes the contributions of the system's workers;

(6) Promotes in the community a sense of responsibility for self and others and is committed to the well-being of children as well as support for families;

(7) Emphasizes local planning for children and families and integrates local needs with statewide goals;

(8) Provides services locally in a process that encourages partnerships, alliances and efficient use of resources; and

(9) Provides local service delivery systems that build on the unique strengths of the county or community.

SECTION 3. (1) Key elements of the service system developed and implemented under this Act are:

(a) A two-to-seven-year incremental implementation process with measurable outcomes;

(b) An implementation process resulting in a system based on nurturing human development; and

(c) A service continuum based on promoting wellness for the children of Oregon. Family resource centers and family service centers are a viable, but not the exclusive, structure for delivering a service continuum.

(2) If a system of family resource centers and family service centers is selected by a local commission on children and families established pursuant to section 12 of this Act:

(a) Family resource centers may serve as the prevention arm of the delivery system and may be integrated into neighborhood-based services with the intent that services be available to all families to promote their children's wellness.

(b) Family service centers may serve as the treatment arm of the delivery system.

SECTION 4. (1) There is established a State Commission on Children and Families consisting of the Director of the Department of Human Resources, the Superintendent of Public Instruction and 12 members appointed by the Governor. The appointments shall reflect the state's diverse populations and regions and shall include representatives with expertise along the full developmental continuum of a child from the prenatal stage through 18 years of age.

(2) The appointed members shall include:

(a) One representative from the Oregon Juvenile Department Director's Association, from which the Governor may solicit suggestions for appointment;

(b) Six public members who have demonstrated interest in children, with consideration given to a youth member and persons from the education community;

(c) Two members from local commissions on children and families, one from a rural area and one from an urban area;

(d) One social service professional; and

(e) Two members from the business community who have demonstrated interest in children.

(3) The term of office of each appointed member is four years. Before the expiration of the term of an appointed member, the Governor shall appoint a successor whose term begins on October 1. An appointed member is eligible for reappointment. If there is a vacancy in an appointed position for any cause, the Governor shall make an appointment to become immediately effective for the unexpired term.

(4) The appointments by the Governor to the state commission are subject to confirmation by the Senate in the manner prescribed in ORS 171.562 and 171.565.

(5) An appointed member of the state commission is entitled to compensation and expenses as provided in ORS 292.495.

(6)(a) The majority of the members of the state commission shall be laypersons.

(b) As used in this subsection, "layperson" means a person whose primary income is not derived from either offering direct service to children and youth or being an administrator for a program for children and youth.

SECTION 5. (1) The State Commission on Children and Families shall promote the wellness of children and families at the state level and shall act in accordance with the principles, characteristics and values identified in sections 1 to 3 of this Act. The state commission shall provide no direct services, but shall be responsible for statewide planning, standards setting and policy development for services to children and families provided by the local commissions.

(2) Funds for local commissions shall consist of payments from moneys appropriated therefor to the State Commission on Children and Families by the Legislative Assembly. The state commission shall develop an equitable formula for the distribution of funds to counties or regions for services to children and families, and a minimum annual grant shall be provided to each county or region.

(3) The state commission shall:

(a) Adopt goals and priorities for serving children and families;

(b) Determine which services, excluding those identified in section 28 (1) and (2) of this Act, may be transferred to the local commissions on children and families based on consul-

tation with appropriate state agencies and each local commission during its planning process. Responsibility for services to children and families shall be transferred to a local commission at the request of the board or boards of county commissioners of a county or region and after a finding by the state commission that the county or region has a comprehensive and competent plan for delivery of services which focuses on prevention and is integrated with all services to children and families;

(c) Be responsible for statewide planning, outcome standard setting and policy development for service to children and families in consultation with appropriate state and local agencies and local commissions;

(d) Advise the Legislative Assembly and the Governor concerning possible solutions to problems facing children and families;

(e) Identify outcomes relating to children and families for incorporation in the Oregon benchmarks;

(f) Determine a list of children's support areas that local commissions must address and assure that each local plan identifies which entities will be responsible for implementing segments of the plan;

(g) Review and approve or deny local plans after a review and comment period and following a public hearing;

(h) Assure that all services for children and families are integrated and evaluated according to their outcomes;

(i) By January 1, 1995, recommend to the Legislative Assembly what additional proposals of "A Positive Future for Oregon's Children and Families" by the 1991-1992 Oregon Children's Care Team Interim Task Force should be undertaken;

(j) By January 1, 2000, implement other recommendations of "A Positive Future for Oregon's Children and Families";

(k) Establish a uniform system of reporting and collecting statistical data from counties and other agencies serving children and families;

(L) In conjunction with the Department of Human Resources, educate, inform and give technical assistance to local commissions about federal and state laws, regulations and rules, and changes therein, governing the use of federal and state funds; and

(m) Make recommendations to the Commission for Child Care for the development of the state's biennial child care plan.

(4) The state commission, in coordination with the local commissions on children and families, shall:

(a) Assist the local commissions in the development and implementation of performance and outcome criteria for evaluating services at the local level;

(b) Monitor the progress in meeting criteria in the local plans;

(c) In coordination with the Department of Human Resources or other appropriate state agency, provide technical assistance to the local commissions in developing the capacity needed to offer all services funded in the approved local plan;

(d) Conduct research and disseminate information to local commissions on children and families;

(e) Negotiate federal waivers in consultation with the Department of Human Resources;

(f) Transfer state and federal funds to the local commission upon approval of its local plan. In those cases where two or more counties have combined to deliver services, the counties shall not receive less as a group than they would have received if each county had participated separately; and

(g) Develop a process for reviewing requests for waivers from requirements of the state commission. Requests for waivers shall be granted or denied as a part of the plan approval process.

(5) The state commission shall employ a staff director who shall be responsible for hiring and supervising any additional personnel necessary to assist the state commission in per-

forming its duties. The director shall represent the state commission on the Oregon Coordinating Council for Children and Families. The staff shall be responsible for management functions of the state commission subject to policy direction by the state commission.

(6) To the extent that federal funding is not jeopardized, the State Commission on Children and Families shall enter into an interagency agreement with the Department of Human Resources in which they agree on a system to:

(a) Distribute all Title XX Social Services Block Grant funds on and after July 1, 1995;

(b) Insure that federal and state requirements are met for federal funds administered by the state commission; and

(c) Carry out the necessary auditing, monitoring and information requirements for federal funds distributed by the state commission.

(7) In addition to the authority under subsection (4)(f) of this section, the state commission may direct the Department of Human Resources or the appropriate state department providing services for children and families, as defined in section 30 of this Act, to negotiate federal waivers. If the Department of Human Resources or any other state agency does not pursue a federal waiver recommended by the state commission, the state commission may ask the governor to direct the Department of Human Resources or other state agency to apply for and negotiate the waiver.

(8) If the Department of Human Resources or any other state agency refuses to distribute state or federal funds as requested by the state commission, the state commission may ask the Governor to direct the Department of Human Resources or other state agency to distribute the funds.

(9) The programs shall be funded as fully as possible by Title XX of the federal Social Security Act, consistent with the terms and conditions of the block grant program and the local plans that reflect community priorities established by the local planning process.

(10) In conjunction with the Department of Human Resources, the state commission, as soon as possible, shall develop a plan to re-engineer and integrate the data processing systems related to children's programs with the objective of making management information more accessible. The state commission shall make regular presentations to the Joint Legislative Committee on Data Processing on its progress in developing and implementing the plan.

(11) Before each regular session of the Legislative Assembly, the state commission shall report to the Governor and to the appropriate joint interim committee as determined by the Speaker of the House of Representatives and the President of the Senate the following:

(a) The status of the children's service system in all counties;

(b) The progress in service areas provided by the state;

(c) Services identified for funding at or transfer to the local level;

(d) Services identified to stay at the state level; and

(e) The status of integration of service delivery for children and families with the Department of Education.

(12) If it is necessary for any interagency agreements to be executed between the Department of Human Resources and the State Office for Services to Children and Families, the agreements shall be executed no later than July 1, 1995.

(13)(a) The state commission may solicit, accept and receive federal moneys or moneys or other property from persons or corporations, public or private, for the purpose of carrying out the provisions of this Act.

(b) All federal moneys collected or received under paragraph (a) of this subsection shall be accepted and transferred or expended by the state commission upon such terms and conditions as are prescribed by the Federal Government.

(c) All moneys and other property accepted by the state commission under this subsection shall be transferred, expended or used upon such terms and conditions as are prescribed by the donor in a manner consistent with applicable law.

SECTION 5a. (1) The Oregon Community Children and Youth Services Commission is abolished, and the tenure of the members of the commission ends 90 days after the effective date of this Act or when the Governor completes the appointments required by section 4 of this Act, whichever is earlier.

(2) The duties, powers and personnel of the Oregon Community Children and Youth Services Commission are transferred to and vested in the State Commission on Children and Families 90 days after the effective date of this Act or when the Governor has completed the appointments required by section 4 of this Act, whichever is earlier.

SECTION 5b. For the 1993-1995 biennium, the Governor and the appropriate legislative interim committee must approve the distribution formula described in section 5 (2) of this Act. In subsequent biennia, distribution of funds according to the formula shall be included in the Governor's budget for consideration by the Legislative Assembly.

SECTION 6. Notwithstanding the term of office specified by section 4 of this Act, of the members first appointed to the State Commission on Children and Families:

(1) Six shall serve for terms ending September 30, 1995.

(2) Six shall serve for terms ending September 30, 1997.

SECTION 7. (1) The Governor shall select a chairperson for the State Commission on Children and Families who shall be a layperson as defined in section 4 (6)(b) of this Act. The state commission shall select one of its members as vice chairperson. The chairperson and vice chairperson shall serve for such terms and with such duties and powers as the state commission determines to be necessary to perform the functions of their offices.

(2) A majority of the members of the state commission constitutes a quorum for the transaction of business. The affirmative vote of a majority of the members of the state commission is required for action by the state commission.

(3) The state commission shall meet once a month for the first year and then at least once every three months at a place, day and hour determined by the state commission. The state commission also shall meet at other times and places specified by the call of the chairperson or of a majority of the members of the commission.

SECTION 8. In accordance with applicable provisions of ORS 183.310 to 183.550, the State Commission on Children and Families may adopt rules necessary to administer the duties of the state commission.

SECTION 9. (1) The Oregon Coordinating Council for Children and Families shall serve as a resource for technical support to the State Commission on Children and Families and shall advise the state commission on program operations and service integration. To further aid and advise the state commission in the performance of its functions, the state commission may establish such advisory and technical committees as it considers necessary. The state commission shall determine the representation, membership, terms and organization of the committees and shall appoint the members.

(2) Members of committees are not entitled to compensation, but at the discretion of the state commission may be reimbursed from funds available to the state commission for actual and necessary travel and other expenses incurred in the performance of their official duties, subject to ORS 292.495.

SECTION 10. The purpose of this Act, as described in sections 1 to 3 of this Act, shall be implemented by all state agencies providing services for children and families, except as described in section 30 of this Act, to guide the providing of those services.

SECTION 11. (1) Effective July 1, 1995, the State Office for Services to Children and Families is established in the Department of Human Resources and the duties, functions and powers of the Children's Services Division are vested in the state office.

(2) The Director of the State Office for Services to Children and Families shall be appointed by the Governor subject to confirmation by the Senate pursuant to ORS 171.562 and 171.565 from among persons well qualified by training and experience to provide the services described in section 28 (1) of this Act.

(3) The state director shall hire and supervise qualified personnel required to provide the services described in section 28 (1) of this Act and may contract as necessary with appropriate public and private providers for such services.

(4) The director shall oversee the development of standards and procedures for assessment, investigation and enforcement of child protective services.

(5)(a) Before July 1, 1995, the Children's Services Division shall take action to implement the provision of child protective services as outlined in this Act and based on the recommendations in the 1992 "Oregon Child Protective Services Performance Study" published by the University of Southern Maine.

(b) In all substantiated cases of child abuse and neglect, the role of the division, or, on and after July 1, 1995, the State Office for Services to Children and Families, is to complete a comprehensive family assessment of risk of abuse or neglect, or both, assess service needs and provide immediate protective services as necessary.

(c) The division shall provide remedial services needed to assure the safety of the child.

(d) In all cases of abuse and neglect when a criminal investigation occurs, the role of law enforcement is to provide a legally sound, child sensitive investigation of whether abuse or neglect, or both, has occurred and to gather other evidence and perform other responsibilities in accordance with interagency agreements.

(e) The division and law enforcement shall conduct the investigation and assessment concurrently, based upon the protocols and procedures of the multidisciplinary team in each jurisdiction.

(f) When conducting a joint investigation and assessment, the activities of the division and law enforcement are to be clearly differentiated by the protocols of the multidisciplinary team.

(g) Nothing in this subsection is intended to be inconsistent with ORS 418.747, 418.748 and 418.749 and sections 53 to 148, chapter 33, Oregon Laws 1993 (Enrolled Senate Bill 257).

(h) If House Bill 5061 becomes law, funds available under House Bill 5061 may be used to provide training for persons providing services under this subsection.

(6) On or before July 1, 1995, all federal funds administered by the Department of Human Resources through the Children's Services Division shall be transferred and made available to the State Office for Services to Children and Families.

SECTION 12. (1) The board of county commissioners of a county or the boards of county commissioners of contiguous counties that agree to appoint a regional commission:

(a) Shall appoint a chairperson and a minimum of eight members to a local commission for children and families in the manner described in section 13 of this Act.

(b) Shall appoint a local staff director. The staff director shall hire and supervise any other support staff necessary for operation of the local commission. The staff director and staff are subject to county personnel policies and other administration policies and ordinances. The staff director shall be responsible for all management functions of the local commission.

(c) Must approve the local plan before it may be submitted to the State Commission on Children and Families. If the local plan has been revised or is amended, the revised or amended plan must be submitted to the board or boards for approval before it is submitted to the state commission.

(2) The board or boards of county commissioners must approve any transfer of responsibility for a state service and its funding to a local commission.

(3) Funds payable to implement local plans shall be paid to the county. The board or boards of county commissioners are responsible for the expenditure of such funds subject to county budget and fiscal operating procedures.

SECTION 13. (1) A majority of the local commission, including the chairperson, shall be laypersons as defined in section 4 (6)(b) of this Act. Appointments to the local commission shall reflect the county's or counties' diverse populations and shall reflect expertise along

the full spectrum of developmental stages of a child, from the prenatal stage through 18 years of age. Members shall include persons who have knowledge of the issues relating to children and families in the affected communities, including education and the court system.

(2) Members of the local commission shall be appointed to four-year terms. However, the appointing board or boards of county commissioners shall establish staggered terms for the persons initially appointed to the local commission. A member is eligible to be appointed for not more than two consecutive terms.

SECTION 13a. (1) The boards of county commissioners of contiguous counties that agree to appoint a regional commission by intergovernmental agreement authorized by ORS chapter 190 shall provide in the agreement for the following:

(a) The appointment of the chairperson and members of the regional commission in the manner described in section 12 of this Act;

(b) The adoption of procedures and policies to govern the regional commission, which adoption may be subject to concurrence by the boards of county commissioners;

(c) The hiring and supervision of support staff necessary for the operation of the regional commission pursuant to section 12 of this Act;

(d) The methods for adoption of a budget for the regional commission, the expenditure of funds and fiscal operating procedures; and

(e) Other conditions and procedures necessary for the cooperation of a regional agency.

(2) The agreement may require the prior approval of the boards of county commissioners for the participating counties to transfer a state service and its funding to the regional commission.

SECTION 14. (1) The main purpose of the local commission is to promote wellness for the children and families in the county or region and to develop policy and oversee the implementation of the local plan developed to achieve the outcomes outlined in subsection (2) of this section.

(2) The local commission shall assess needs and identify county or regional outcomes to be achieved. It shall develop and prepare a comprehensive area-wide service delivery plan for each biennium for all services to be provided for children and families in the county or region during the biennium. The local plan shall be designed to achieve state and county or regional outcomes, including the Oregon benchmarks, based on state guidelines and to maintain a level of services consistent with state and federal requirements.

(3) The local commission shall prepare the county or regional plan and application for funds to implement this Act. The plans, policies and proposed service delivery systems shall be submitted to the board or boards of county commissioners for approval prior to submission to the state commission. The county or regional plan shall be based on identifying the most effective service delivery system allowing for the continuation of current public and private programs where appropriate. The local commission shall monitor progress of key outcomes related to the county or regional plan.

(4) The plan shall include:

(a) Subject to the availability of funds:

(A) Consideration of prenatal and postnatal screening, assessment and referral to the appropriate services for at-risk children and families, including home visitations and health care, to promote the wellness of the child at the earliest possible time and also include consideration of crisis nurseries; and

(B) Services to children who are newborn through 18 years of age and their families; and

(b) A list of staff positions budgeted to support the local commission on children and families. The list shall indicate the status of each position as a percentage of full-time equivalency dedicated to the implementation of the plan. The county board or boards of commissioners shall be responsible for providing the level of staff support detailed in the plan and shall insure that funds provided for these purposes are used exclusively to carry out the plan.

- (5) The plan shall be based on:
- (a) Children's support areas;
 - (b) Local needs and desired outcomes;
 - (c) Local, state and federal resources;
 - (d) Best practices for the specific community; and
 - (e) Continuation of current public and private services where appropriate.
- (6) In developing the local comprehensive plan, the local commission shall:
- (a) Secure the active participation of local and state service providers, educators, courts, representatives of advisory groups and other groups planning for the delivery of services to children and families, consumers, juvenile justice professionals, child and family advocates, business leaders, citizen review boards, churches, populations representing a diversity of genders, cultures, orientations and disabilities of the county or region, and other private organizations and citizens;
 - (b) Provide for community participation in the planning process, including media notification;
 - (c) Conduct an assessment of the community that identifies needs and strengths;
 - (d) Identify opportunities for service integration;
 - (e) Develop a comprehensive plan and budget to meet the priority needs of a county or region;
 - (f) Inform the citizenry about the contents of the plan and provide for a public review and comment period; and
 - (g) Develop a method for evaluating service outcomes.
- (7) The State Commission on Children and Families may disapprove a local plan in whole or in part only upon making specific findings that the local plan substantially fails to conform to the principles, characteristics and values identified in sections 1 to 3 of this Act. If the state commission disapproves a local plan in whole, the state commission shall identify with particularity the manner in which the local plan is deficient. If the state commission disapproves only part of the plan, the remainder of the plan may be implemented. The staff of the state commission shall assist in remedying the deficiencies in the local plan. The state commission shall set a date by which the local plan or the deficient portion thereof shall be revised and resubmitted.
- (8) If a local commission determines that the needs of the county or region it serves differ from those identified by the state commission, it may ask the state commission to waive specific requirements in its list of children's support areas. The process for granting waivers shall be developed by the state commission prior to the start of the plan approval process and shall be based primarily on a determination of whether the absence of a waiver would prevent the local commission from best meeting the needs of the county or region.
- (9) From time to time, the local commission may amend the local plans and applications for funds to implement this Act upon approval of the board or boards of county commissioners and the State Commission on Children and Families.
- (10) The local commission shall provide an opportunity for public and private contractors to review the components of the plan, to receive notice of any component that the county intends to provide through a county agency and to comment publicly to the county board of commissioners if they disagree with the proposed service delivery plan.

SECTION 15. Funds received by a county or counties from the state to implement this Act shall not be used to replace county general fund moneys, other than federal or state funds, currently being used by the county for existing programs for children and youth. However, in case of severe financial hardship demonstrated by a county or counties, the State Commission on Children and Families may waive the requirements of this section in approving the local plan.

SECTION 16. A local commission is the recommended local structure for implementation of this Act. However, a county or counties may elect to offer another structure but shall

submit only one local plan. The alternative structure must be approved by the State Commission on Children and Families.

SECTION 17. The appointments required by section 4 of this Act shall be made within 90 days after the effective date of this Act. The appointment required by section 11 of this Act shall be made on or before July 1, 1995.

SECTION 18. (1) On or before February 1, 1994, each local commission on children and families shall be appointed and shall hold an organizational meeting. If the recommended local structure is an alternative to a local commission as authorized by section 16 of this Act, the board or boards of county commissioners must propose the alternative structure to the State Commission on Children and Families by February 1, 1994, so that the structure may be approved or denied by March 1, 1994.

(2) The local plan must be completed and submitted for approval by the state commission by July 31, 1994. The state commission shall approve or deny each local plan within two months after it is submitted.

SECTION 19. ORS 184.007 is amended to read:

184.007. In consultation with the Executive Department and the [*Oregon Coordinating Council for Children and Families*] **State Commission on Children and Families**, the Oregon Progress Board in adopting biennial lead benchmarks shall give priority to benchmarks that have the potential to yield a high return on human investment, including but not limited to greater worker productivity and future monetary savings.

NOTE: Sections 20 through 22 were deleted. Subsequent sections were not renumbered.

SECTION 23. ORS 326.795 is amended to read:

326.795. (1) Education and other programs providing services to children and families, as identified in ORS 417.315 (4), shall:

(a) Evaluate the effectiveness of the program as related to the principles stated in ORS 326.715 and 417.305 in the earliest stages of the budget process;

(b) Articulate ways in which the program is an effective component of agency and state priorities, goals and strategies, such as those developed by the Oregon Progress Board, or to relevant research and professional standards;

(c) Establish plans, interagency partnerships, implementation practices and interactions with local and private sectors [*required by ORS 417.305 (3)*];

(d) Utilize the information generated by applicable state advisory groups and by the local planning process administered by the [*Oregon Community Children and Youth Services Commission*] **State Commission on Children and Families** in the program assessment of needs and decisions as to service delivery in a given community; and

(e) Identify barriers to improving program capability to serve the needs of young children and related recommendations, if any.

(2) The processes listed in subsection (1) of this section are for the purpose of generating interagency coordination [*described in ORS 417.305*] so as to serve to the greatest extent possible young children and their families in a comprehensive and developmentally appropriate fashion. The information generated by these processes shall be considered as a contribution to subsequent budget decisions by state and local agencies, the Executive Department and Legislative Assembly, and as a contribution to the planning [*and coordination*] tasks of the [*Oregon Coordinating Council for Children and Families*] **State Commission on Children and Families** and the coordinating tasks of the Oregon Coordinating Council for Children and Families.

NOTE: Sections 24 through 27 were deleted. Subsequent sections were not renumbered.

SECTION 28. (1) Effective July 1, 1995, the State Office for Services to Children and Families shall be responsible for child protective services, close custody services, foster care, residential care for children and adoption services and other entitlement programs currently administered by the Children's Services Division.

(2) The Mental Health and Developmental Disability Services Division shall be responsible for psychiatric residential and day treatment services for children and specialized services for children with severe cognitive, physical and medical impairments.

(3) Notwithstanding subsection (1) of this section, beginning on the effective date of this Act, the department and the state commission may agree to establish pilot programs in counties that are capable of handling the program to administer foster care programs under the department's jurisdiction. The pilot program must be accepted by the board of county commissioners in the comprehensive local plan. The pilot program shall be subject to federal requirements and the restrictions agreed upon between the department and the county where the pilot program is located.

SECTION 29. Effective July 1, 1995, the State Commission on Children and Families shall:

(1) Determine when funds for services to children and families not described in section 28 (1) and (2) of this Act are to be transferred to the local commission. If a local commission with an approved plan requests a transfer, the state commission shall determine whether funds can be transferred.

(2) Determine which, if any, services to children and families that are not described in section 28 (1) and (2) of this Act are not to be transferred to local commissions but are to remain state responsibilities.

SECTION 30. As used in this Act, "services for children and families" does not include those services provided by the Department of Education.

SECTION 31. The State Commission on Children and Families shall:

(1) Make Student Retention Initiative grants to fund student retention initiatives designed to identify youths in danger of leaving school before graduation and to assist them in completing their education.

(2) Make Great Start grants with the goal of having children reach the first grade with good physical, social, emotional and language development. The state commission shall assist counties in the implementation and operation of Great Start programs for children who are newborn to six years of age including parent support programs, child care and child development services, physical and mental health promotion and access to services.

(3) Make juvenile services grants to fund juvenile delinquent programs for diversion, delinquency prevention, detention, shelter care, probation, restitution, family support services and community centers for the care and treatment of juveniles in need of services, for the purpose of reducing the rate of juvenile delinquency.

SECTION 32. The chief executive officer of each agency whose duties, functions and powers are transferred by this Act to another state officer or agency shall deliver to such other officer or agency all records and property within the jurisdiction of the officer that relate to the duties, functions and powers so transferred, and shall transfer those employees engaged primarily in the exercise of the duties, functions and powers so transferred. The chief executive officer of the state agency to which such delivery and transfer is made shall take possession of such property, and shall take charge of such employees and employ them in the exercise of their duties, functions and powers assigned or transferred by this Act, without reduction of compensation but subject to change or termination of employment or compensation as provided by law. Any dispute as to transfers of property and employees under this section shall be resolved by the Governor, and the Governor's decision is final.

SECTION 33. Except as otherwise provided in this Act, all unexpended moneys appropriated or otherwise available to a state officer or agency for the purposes of any of its duties, functions or powers transferred by this Act to another state officer or agency are appropriated to such other state officer or agency.

SECTION 34. Any proceeding, action, prosecution or other business or matter undertaken or commenced before the effective date of this Act by a state officer or agency, with respect to the duties, functions or powers transferred to another state officer or agency by this Act, and still pending on the effective date of this Act, may be conducted and completed

by the other state officer or agency in the same manner, under the same terms and conditions and with the same effect as though undertaken, conducted or completed by the former state officer or agency before the transfer.

SECTION 35. Nothing in this Act relieves any person of any obligation with respect to a tax, fee, fine or other charge, interest, penalty, forfeiture or other liability, duty or obligation.

SECTION 36. A state officer or agency to which duties, functions and powers are assigned and transferred by this Act is considered to be a continuation of the former state officer or agency with respect to such duties, functions and powers, and not a new authority, for the purpose of succession to all rights and obligations of the former state officer or agency as constituted at the time of such assignment or transfer, except as otherwise provided by this Act, with the same force and effect as if such duties, functions and powers had not been assigned or transferred.

SECTION 37. (1) Whenever, in any law or resolution of the Legislative Assembly or in any rule, document, record or proceeding authorized thereby, reference is made to a state officer or agency, or employee thereof, whose duties, functions or powers are assigned or transferred by this Act, except as otherwise provided in this Act such reference is considered to describe the state officer, agency or employee that by this Act is charged with carrying out such duties, functions and powers.

(2) The lawful rules of state officers and agencies with respect to duties, functions or powers assigned or transferred by this Act continue in effect for no more than 180 calendar days after the effective date of this Act or until superseded or rescinded by rules lawfully adopted by the state officer or agency to which was transferred the duty, function or power to which the rules apply, whichever occurs earlier. However, any rule that is inconsistent with the provisions of this Act is repealed on the effective date of this Act.

SECTION 38. A transfer of duties, functions, powers, rights, records, property, employees or moneys by this Act does not become operative until the chief executive officer of the state agency to which they are transferred has been appointed and has qualified. Until then the former officer or agency vested therewith shall continue to exercise and perform such duties, functions, powers and rights, and to have charge of such records, property, employees and moneys.

SECTION 39. For the purpose of harmonizing and clarifying statute sections published in Oregon Revised Statutes, the Legislative Counsel may substitute for words designating the Oregon Community Children and Youth Services Commission from which duties, functions or powers are transferred by this Act, wherever they occur in Oregon Revised Statutes, other words designating the State Commission on Children and Families to which such duties, functions or powers are transferred.

SECTION 40. ORS 169.090 is amended to read:

169.090. (1) The Director of the Department of Corrections shall publish and distribute a manual of recommended guidelines for the operation of local correctional facilities and lockups as developed by a jail standards committee appointed by the director. This manual shall be revised when appropriate with consultation and advice of the Oregon Sheriffs Association, the Oregon Association of Chiefs of Police, Association of Oregon Counties, the League of Oregon Cities and other appropriate groups and agencies and will be redistributed upon the approval of the Governor.

(2) The [*Oregon Community Children and Youth Services Commission*] **State Commission on Children and Families** and the Department of Corrections[, *as provided in ORS 417.490,*] shall develop guidelines pertaining to the operation of juvenile detention facilities, as defined in ORS 169.005 (2). Guidelines shall be revised by the commission and the Department of Corrections, whenever appropriate. The guidelines shall be included in the manual published and distributed under subsection (1) of this section. However, the [*Oregon Community Children and Youth Services*] commission may choose to publish and distribute the guidelines independently.

SECTION 41. Section 44, chapter 33, Oregon Laws 1993 (Enrolled Senate Bill 257), as amended by section 92, chapter _____, Oregon Laws 1993 (Enrolled Senate Bill 1051), is further amended to read:

Sec. 44. (1) In every case involving an abused or neglected child which results in a judicial proceeding in juvenile court, the court shall appoint a court appointed special advocate. The court appointed special advocate shall be deemed a party in these proceedings, and in the furtherance thereof, may be represented by counsel, file pleadings and request hearings and may subpoena, examine and cross-examine witnesses. If the court appointed special advocate is represented by counsel, counsel shall be paid from funds available to the Court Appointed Special Advocate Volunteer Program. No funds from the State Indigent Defense Fund or Judicial Department operating funds shall be used for this purpose.

(2) Subject to the direction of the court, the duties of the court appointed special advocate shall be to:

- (a) Investigate all relevant information about the case;
- (b) Advocate for the child, assuring that all relevant facts are brought before the court;
- (c) Facilitate and negotiate to insure that the court, Children's Services Division or **State Office for Services to Children and Families**, if applicable, and the child's attorney, if any, fulfill their obligations to the child in a timely fashion; and

(d) Monitor all court orders to insure compliance and to bring to the court's attention any change in circumstances that may require a modification of the court's order.

(3) If a juvenile court does not have available to it a CASA Volunteer Program, or a sufficient number of qualified CASA volunteers, the court may, in fulfillment of the requirements of this section, appoint a juvenile department employee or other suitable person to represent the child's interest in court pursuant to section 5 or 72, chapter 33, Oregon Laws 1993 (Enrolled Senate Bill 257).

(4) Any person appointed as a court appointed special advocate in any judicial proceeding on behalf of the child shall be immune from any liability for defamation or statements made in good faith by that person, orally or in writing, in the course of the case review or judicial proceeding.

(5) Any person appointed as a court appointed special advocate, CASA Volunteer Program director, CASA Volunteer Program employee or member of the board of directors or trustees of any CASA Volunteer Program shall be immune from any liability for acts or omissions or errors in judgment made in good faith in the course or scope of that person's duties or employment as part of a CASA Volunteer Program.

(6) Whenever the court appoints a court appointed special advocate or other person under subsections (1) to (3) of this section to represent the child, it may require a parent, if able, or guardian of the estate, if the estate is able, to pay, in whole or in part, the reasonable costs of CASA services including reasonable attorney fees. The court's order of payment shall be enforceable in the same manner as an order of support under section 125, chapter 33, Oregon Laws 1993 (Enrolled Senate Bill 257).

(7) Upon presentation of the order of appointment by the court appointed special advocate, any agency, hospital, school organization, division or department of the state, doctor, nurse or other health care provider, psychologist, psychiatrist, police department or mental health clinic shall permit the court appointed special advocate to inspect and copy any records relating to the child or children involved in the case, without the consent of the child or children or parents.

(8) All records and information acquired or reviewed by a court appointed special advocate during the course of official duties shall be deemed confidential under section 49, chapter 33, Oregon Laws 1993 (Enrolled Senate Bill 257).

(9) For the purposes of a Child Abuse Prevention and Treatment Act (42 U.S.C. § 5101 et seq.) grant to this state under Public Law No. 93-247, or any related state or federal legislation, a court appointed special advocate or other person appointed pursuant to subsections (1) to (3) of this section shall be deemed a guardian ad litem to represent the interests of the minor in proceedings before the court. Any provisions of this section and sections 20 and 22, **chapter _____, Oregon**

Laws 1993 (Enrolled Senate Bill 1051), [of this 1993 Act] which shall cause this state to lose federal funding shall be considered null and void.

(10) There is created a Court Appointed Special Advocate (CASA) Fund in the General Fund. The fund shall consist of all moneys credited thereto. Moneys appropriated to the Court Appointed Special Advocate Fund by this section and sections 20 and 22, **chapter _____, Oregon Laws 1993 (Enrolled Senate Bill 1051)**, [of this 1993 Act] may be used only to carry out the purposes of this section. The [Oregon Community Children and Youth Services Commission] **State Commission on Children and Families** may apply for and receive funds from federal and private sources for carrying out the provisions of this section and sections 20 and 22, **chapter _____, Oregon Laws 1993 (Enrolled Senate Bill 1051)** [of this 1993 Act].

(11) The [Oregon Community Children and Youth Services Commission] **state commission** may expend moneys from the Court Appointed Special Advocate Fund directly or indirectly through contracts or grants for the creation, supervision and operation of CASA Volunteer Programs statewide in accordance with the provisions of ORS 423.310 to 423.350. The [Oregon Community Children and Youth Services] commission may also expend moneys from the Court Appointed Special Advocate Fund to pay the reasonable costs of its administration of the Court Appointed Special Advocate Fund. The [Executive Director of the Oregon Community Children and Youth Services] commission shall adopt rules for carrying out [the] its responsibilities [of the commission] under this section and sections 20 and 22, **chapter _____, Oregon Laws 1993 (Enrolled Senate Bill 1051)** [of this 1993 Act].

[(12) Prior to April 1 of each odd-numbered year, the Oregon Community Children and Youth Services Commission shall determine each county's estimated percentage share of the amount appropriated for the purposes of this section. Such determination shall be based upon each county's respective share of resident children 17 years of age and younger, determined in accordance with rules adopted by the commission. In cases where two or more counties have combined to deliver services to resident children, the counties shall not receive less as a group than they would have received if each county had participated separately.]

[(13) The numbers of resident children 17 years of age and younger for each county shall be certified to the commission by January 1 of each odd-numbered year by the Center for Population Research and Census.]

[(14) The amount determined to be due each county shall be deposited in and credited to the Court Appointed Special Advocate Fund to be held in separate subaccounts for each county and to be used only for the Court Appointed Special Advocate Volunteer Program in that county.]

SECTION 41a. ORS 417.315 is amended to read:

417.315. (1) The Oregon Coordinating Council for Children and Families shall present a written report to the Legislative Assembly and the Governor as to how state agencies are to collaborate with one another at state and local levels to serve children and families in Oregon most efficiently.

(2) The report and recommendations shall be submitted annually to the Governor and the President of the Senate and Speaker of the House of Representatives for referral to appropriate interim or standing committees of the Legislative Assembly.

(3) The council shall develop a means to insure that the council considers in its planning, budgeting, coordinating and other activities the information devised by the local planning process created by [ORS 417.400, 417.405, 417.420 to 417.430, 417.440, 417.445, 417.475, 417.490 and 417.500,] **this 1993 Act** as well as the information generated by state advisory groups, local government planning and operational efforts, community programs and state personnel working at the local [levels] level.

(4) The council's report shall include but is not limited to the following:

- (a) Identification of children and family services and education programs of state agencies;
- (b) Assessment of duplication of children and family services and education programs among state agencies;

(c) Identification of advisory committees, task forces and commissions related to children and family services and education programs by state agencies, and description as to their mission and operational status;

(d) Recommendations as how to best coordinate and utilize services;

(e) Recommendations as to the most effective manner of informing the public of the availability of appropriate children and family services and education program resources in each local community;

(f) Proposals, including budget proposals and priorities for meeting unmet needs, for appropriate legislation or Legislative Assembly action to accomplish report recommendations, the goals incorporated in ORS 326.051, 409.080, 409.200, 411.060, 417.300 to 417.335, [417.490,] 430.021 and 431.110 and this 1993 Act and benchmarks and council outcomes; and

(g) Assessment of progress toward the goals stated in ORS 417.305 to 417.315, benchmarks and council outcomes.

SECTION 42. ORS 417.700 is amended to read:

417.700. (1) The [*Oregon Progress Board established under chapter 908, Oregon Laws 1989,*] **State Commission on Children and Families** shall [*design a program of implementation of*] **administer** the Individual Children's Development Account Program. The program shall include but not be limited to:

(a) Eligibility criteria for state participation in the funding of the Individual Children's Development Accounts, including but not limited to, utilization of a sliding scale based on family income;

(b) A mechanism for community and business contributions to Individual Children's Development Accounts;

(c) Proposal for tax incentives for the establishment and maintenance of such accounts; and

(d) Recommendations regarding account purposes, including but not limited to, the purposes set forth in subsection [(3)] (2) of this section.

[(2) The board shall include the program required by subsection (1) of this section in a report prepared for submission to the Sixty-seventh Legislative Assembly together with any proposed legislation for implementation of the program.]

[(3)] (2) As used in this section, "Individual Children's Development Account Program" means a program established by parents or by the government with parental consent for an Oregon child less than 18 years of age at the time of its establishment that may be used at any age by that child for one or more of these purposes:

(a) Securing post-high school education, including but not limited to, community college, four-year college or university or post-college graduate education;

(b) Securing post-high school job training, including but not limited to, vocational or trade school;

(c) Purchasing a home for the first time, either alone or with another; or

(d) Capitalizing a business.

SECTION 43. ORS 418.653 is amended to read:

418.653. (1) Subject to the availability of funds therefor, there is created an Oregon Youth Conservation Corps which shall provide emergency services, public conservation, rehabilitation and improvement programs. The corps shall be headed by a program director, and shall be administered through the [*Oregon Community Children and Youth Services Commission as described in ORS 417.475*] **State Commission on Children and Families**.

(2) Upon implementation of subsection (1) of this section, there shall be created an Oregon Youth Conservation Corps Advisory Committee to consist of nine members, three to be appointed by the President of the Senate, three to be appointed by the Speaker of the House of Representatives and three public members to be appointed by the Governor. No more than one Senator and one Representative shall be appointed. Members shall receive no compensation for service on the committee. Members may be removed by the appointing authority. Vacancies shall be filled by the appointing authority. Members shall serve for a term of three years and may be reappointed for an additional consecutive term.

(3) The advisory committee established under subsection (2) of this section shall advise the program director on the implementation of ORS 418.650 to 418.663.

SECTION 44. ORS 418.657 is amended to read:

418.657. (1) In consultation with the advisory committee and with the approval of the [*Oregon Community Children and Youth Services Commission*] **State Commission on Children and Families**, the program director shall:

(a) Establish eligibility criteria for participants. Such criteria shall not render the program ineligible for federal funds. Participants shall be lawful permanent residents of the state.

(b) Establish criteria in order to make the required determination that enrollment in the corps was not the reason that an individual ceased attendance at a secondary school.

(c) Assume that application of the eligibility and participation criteria results in enrollment of at least 75 percent disadvantaged and at-risk youth among the total number of participants.

(2) With the approval of the [*Executive Director of the Oregon Community Children and Youth Services*] commission, the program director may take the following actions, including but not limited to:

(a) Applying for and accepting grants or contributions of funds from any public or private source;

(b) Making agreements with any local, state or federal agency to utilize any service, material or property of any such agency, where such agreements are considered reasonable and necessary; and

(c) Purchasing or contracting for necessary private services, equipment, materials and property where such are needed to carry out the projects approved for and undertaken by the corps.

(3) With the approval of the [*Executive Director of the Oregon Community Children and Youth Services*] commission, the program director may adopt all necessary rules to carry out the purposes and objectives of the program and to regulate the standards of conduct and other operating guidelines for corps members and other personnel.

(4) Corps members shall be exempt from the State Personnel Relations Law.

SECTION 45. ORS 418.658 is amended to read:

418.658. (1) The Director of the Oregon Youth Conservation Corps shall establish a separate program known as the Oregon Community Service Corps. In addition to the established purposes of the Oregon Youth Conservation Corps, the purpose of the Oregon Community Service Corps is to promote community service activities throughout the state for a broad cross section of Oregon disadvantaged and at-risk youth through programs that also include appropriate educational and job training opportunities for participants.

(2) In addition to projects submitted under ORS 418.660 (1), projects of the Oregon Community Service Corps may include, but shall not be limited to:

(a) Child care services.

(b) Elderly and disabled care services.

(c) Literacy education programs.

(d) Recycling and other waste reduction services.

(3) The Oregon Community Service Corps shall offer employment and educational opportunities of at least three but not more than 12 months' duration for selected participants.

(4) Under rules adopted by the program director, participants who successfully complete any 12-month program under this section shall be eligible for \$1,500 in tuition vouchers that can be used at any vocational or post-secondary educational institution that is qualified to receive assistance through the State Scholarship Commission.

(5) All Oregonians who are at least 16 years of age and under 25 years of age are eligible to participate in the program. To insure that Oregon Community Service Corps participants represent a broad cross section of Oregonians, special emphasis shall be given to recruiting high school dropouts and other disadvantaged and at-risk youth, according to criteria established by the Oregon Youth Conservation Corps Advisory Committee.

(6) To the extent practicable, the program director shall enlist state and federal agencies, local government, nonprofit organizations, and private businesses, and any combination of such entities, to act as sponsors for programs administered under this section. Selection of sponsors shall be based on criteria that include the following:

(a) The availability of other resources on a matching basis, including contributions from private sources, other federal, state and local agencies, and moneys available through the Job Training Partnership Act (P.L. 97-300, as amended, 29 U.S.C. 1501 et seq.);

(b) The provision of related educational and job training programs to participants, including but not limited to high school and college coursework, General Educational Development test (GED) equivalency training, project-related education and vocational training;

(c) Assurances that proposed projects will not displace existing employees or duplicate existing private or government programs;

(d) Assurances that proposed projects are devoted to the enhancement of the community and are not based in maintenance activities and that these projects meet an identified need; and

(e) Assurances that the proposed projects have been reviewed by the appropriate local [*children and youth services commission established under ORS 417.445*] **commission on children and families established under section 12 of this 1993 Act.**

(7) In consultation with the advisory committee and with the approval of the local [*children and youth services*] commission, the program director shall make grants for programs administered under this section.

SECTION 46. ORS 418.660 is amended to read:

418.660. (1) The program established under ORS 418.650 to 418.663 may include, but shall not be limited to, projects such as:

(a) Rangeland conservation, rehabilitation and improvement;

(b) Endangered species and other wildlife habitat conservation, rehabilitation and improvement;

(c) Urban revitalization;

(d) Historical and cultural site preservation and maintenance;

(e) Recreational area development, maintenance, improvement and beautification;

(f) Road and trail maintenance and improvement;

(g) Soil conservation work, including erosion control;

(h) Flood, drought and storm damage assistance and relief;

(i) Stream, lake, waterfront harbor and port improvement and pollution control;

(j) Fish culture and habitat maintenance and improvement;

(k) Insect, disease, rodent and other pestilence control;

(L) Improvement of abandoned railroad land and right of way;

(m) Land reclamation and improvement, including strip-mined lands, public landscape work and tree planting programs;

(n) Energy conservation projects including assistance in the performance of energy efficiency audits, weatherization and renewable resource enhancement;

(o) Emergency assistance in times of natural or other disaster; and

(p) Recycling projects.

(2) In consultation with the advisory committee and with the approval of the local [*children and youth services commission*] **commission on children and families established under section 12 of this 1993 Act**, the program director shall assure that projects selected under ORS 418.650 to 418.663 shall be consistent with all other provisions of applicable state and federal law relating to the management, oversight and administration of affected public lands.

SECTION 47. ORS 420.017 is amended to read:

420.017. (1) The Children's Services Division or the State Office for Services to Children and Families shall develop annually a plan for diversion of delinquent youth from commitment to the juvenile training schools to alternative community services.

(2) In consultation with the local [*juvenile services*] commissions **on children and families established under [ORS 417.445] section 12 of this 1993 Act**, the juvenile [*courts*] **departments** shall

develop a plan for services needed to divert the commitment of youth from the juvenile training schools, and how these services are to be administered if funds are provided. Following review and comment by local [juvenile services] commissions, the plan shall be submitted to the Juvenile Corrections Council. The plan must be approved in the form of a resolution by the governing body of the appropriate county and of a letter of concurrence from the presiding judge of the juvenile court having jurisdiction in juvenile cases.

(3) The division **or the office** shall develop a statewide diversion plan after taking the local juvenile [courts] **departments'** plans into consideration and consulting with the Juvenile Corrections Council.

SECTION 48. ORS 326.615 is amended to read:

326.615. The Department of Education and the Office of Community College Services shall establish an advisory committee composed of interested parents and representatives from the [Children's Services Division] **State Commission on Children and Families**, health care profession, early childhood education and development staff preparation programs, Oregon Head Start Association, school districts, community colleges, Early Intervention Council, child care and other organizations as considered necessary by the department and the Office of Community College Services to assist with the establishment of the approved Oregon prekindergarten and parent-as-teacher programs.

SECTION 49. ORS 336.168 is amended to read:

336.168. (1)(a) Notwithstanding ORS 336.165, no district school board shall require tuition for courses not part of the regular school program, except for driver instruction, from a pupil who is a member of a low-income family in an amount in excess of what the low-income family may receive as money specifically to be used for payment of such tuition.

(b) As used in this subsection, "low-income family" means a family whose children qualify for free or reduced price school meals under the federal lunch program, including but not limited to the National School Lunch Act and the Child Nutrition Act of 1966, and all their subsequent amendments.

(2) A family that does not qualify under subsection (1) of this section but believes the payment of school tuition is a severe hardship may request the district school board to waive in whole or in part the payment of such tuition.

(3) Any parent or guardian who believes that payment of any fee authorized under ORS 339.155 is a severe hardship may request the district school board to waive payment of the fee and the board shall waive in whole or in part the fee upon a finding of hardship. Consideration shall be given to any funds specifically available to the parent, guardian or child for the payment of fees or other school expenses.

(4) No district school board shall impose or collect fees authorized under ORS 339.155 from any student who is a ward of a juvenile court or of the Children's Services Division **or the State Office for Services to Children and Families** unless funds are available therefor in the court's, **office's** or [the] division's budget.

(5) No district school board is required to waive any fee imposed under ORS 339.155 (5)(a) or (d).

SECTION 50. ORS 339.195 is amended to read:

339.195. (1) Every child at a youth care center, as defined in ORS 420.855, which is operated by a private agency, is entitled to receive appropriate education suited to the needs of the child in the least restrictive environment in which the child can function until the child is no longer of compulsory school age or receives a high school diploma or an equivalent.

(2) The district shall develop an educational plan for the children in the youth care center in consultation with the director of the center. The plan shall be submitted to the Department of Education annually. In the second and subsequent years, the district also shall report on the operation of the previous year's plan in such detail as the State Board of Education shall specify by rule.

(3) Payments from the Department of Education from funds appropriated specifically for this section shall be distributed on a per capita basis according to the number of children for whom the

Children's Services Division or the State Office for Services to Children and Families contracts for care and rehabilitation under ORS 420.855 to 420.885.

(4) In order to be eligible for any funds under subsection (3) of this section, an attending district must provide education leading to a diploma or equivalent.

(5) The Superintendent of Public Instruction shall have the authority to enforce the provisions of ORS 339.175 to 339.195. If a district fails to comply, the superintendent shall find the district deficient and shall apply the penalty provided in ORS 327.103.

(6) The State Board of Education shall adopt rules to implement this section.

(7) Nothing in this section limits or otherwise applies to educational rights of children in youth care centers operated by public agencies.

SECTION 51. ORS 339.505 is amended to read:

339.505. (1) For purposes of the student accounting system required by ORS 339.515, the following definitions shall be used:

(a) "Graduate" means an individual who has not reached 21 years of age or whose 21st birthday occurs during the current school year; has met all state requirements and local requirements for attendance, competence and units of credit for high school; and has received one of the following:

(A) A high school diploma issued by a school district.

(B) An adult high school diploma issued by an authorized community college.

(C) A modified high school diploma based on the successful completion of an individual education plan.

(b) "School dropout" means an individual who:

(A) Has enrolled for the current school year, or was enrolled in the previous school year and did not attend during the current school year;

(B) Is not a high school graduate; and

(C) Has withdrawn from school.

(c) "School dropout" does not include a student described by at least one of the following:

(A) Student has transferred to another educational system or institution that leads to graduation and the school district has received a written request for the transfer of the student's records or transcripts.

(B) Student is deceased.

(C) Student is participating in home instruction paid for by the district.

(D) Student is being taught by a private teacher or parent pursuant to ORS 339.030 (3).

(E) Student is participating in a Department of Education approved public or private education program, including an alternative education program, a Department of Human Resources facility or a hospital education program.

(F) Student is temporarily residing in a juvenile detention facility or a Children's Services Division or State Office for Services to Children and Families certified shelter care program.

(G) Student is enrolled in a foreign exchange program.

(H) Student is temporarily absent from school because of suspension, a family emergency, or severe health or medical problems which prohibit the student from attending school.

(2) The State Board of Education shall prescribe by rule when an unexplained absence becomes withdrawal, when a student is considered enrolled in school, acceptable alternative programs under ORS 339.605 to 339.640 and the standards for excused absences for purposes of ORS 339.065 for family emergencies and health and medical problems.

SECTION 52. ORS 336.435 is amended to read:

336.435. (1) The Department of Education shall administer the Early Childhood Improvement Program to assist public school districts in providing programs designed to improve educational services for children enrolled in grades kindergarten through three. Programs shall be based on research and proven successful practices in programs such as Head Start. The department shall evaluate the programs which receive grants under ORS 326.705 to 326.835, 327.006, 327.103, 335.125, 335.140 to 335.180, 336.157, 336.435, 336.437, 336.557, 336.705, 336.730, 336.745, 339.115, 342.017 and 343.415 and report the results of the evaluation to the Legislative Assembly.

- (2) The programs shall include the following planned components:
- (a) Targeted services for "at-risk" children and families, which may include but are not limited to remedial and alternative academic programs, child care, parent participation and child development services.
 - (b) Efforts to improve the kindergarten through third grade curriculum and educational practices so that they:
 - (A) Are consistent with research findings on how children learn;
 - (B) Are sensitive to individual differences such as cultural background and learning styles; and
 - (C) Encourage parent participation. Such efforts may include but are not limited to adapting curricula and training administrators and other staff in early childhood education and child development.
 - (c) Comprehensive education, health care and social services for children to be provided through interagency agreements among school districts, health care and social service providers.
 - (d) Evaluation of programs by goals set by the district for the program.
 - (e) Planned transition from prekindergarten programs to grades kindergarten through three.
- (3) In addition to the components listed in subsection (4) of this section, Early Childhood Improvement Programs may include but are not limited to the following components:
- (a) Extended day services for school age children who need care or enrichment opportunities; and
 - (b) Programs designed to improve the adult to child ratios in grades kindergarten to three.
- (4) The district application shall include:
- (a) Plans developed by 21st Century Schools Councils at the school building level as described in ORS 336.745; and
 - (b) Demonstrated consistency with the local assessments and plans resulting from **this 1993 Act** [*the juvenile program planning described in ORS 417.415*].
- (5) Public school districts or consortia of such districts with education service districts are eligible to receive funds under ORS 326.705 to 326.835, 327.006, 327.103, 335.125, 335.140 to 335.180, 336.157, 336.435, 336.437, 336.557, 336.705, 336.730, 336.745, 339.115, 342.017 and 343.415. Funds shall be available to districts with approved applications on a per child basis for the district's children enrolled in kindergarten through grade three. Funds not allocated shall be prorated to the districts with approved applications not later than the end of the fiscal year for which the allocation is made.
- (6) If the district plan proposes use of innovative instructional materials, the State Board of Education, pursuant to ORS 337.050, may waive the use of such instructional materials as might otherwise have been required.
- SECTION 53.** (1) ORS 417.330, 417.335, 417.364, 417.400, 417.405, 417.410, 417.415, 417.420, 417.425, 417.430, 417.435, 417.440, 417.445, 417.455, 417.475, 417.480, 417.485, 417.490, 417.500, 417.510 and 417.672 are repealed on the effective date of this Act.
- (2) ORS 409.210, 409.620 and 409.630 are repealed on July 1, 1995.
- SECTION 54.** (1) There is appropriated to the State Commission on Children and Families for the biennium beginning July 1, 1993, out of the General Fund, the following amounts for the following purposes:
- (a) State administration..... \$ 751,589
 - (b) Local administration..... \$ 3,900,000
- (2) There is appropriated to the Emergency Board for the biennium beginning July 1, 1993, out of the General Fund, the sum of \$588,832 which shall be expended for the purposes set out in section 5 (10) of this Act. The Emergency Board may authorize expenditures of any or all of the amount appropriated by this section upon approval by the Joint Legislative Committee on Data Processing of a plan from the State Commission on Children and Families that will achieve the purposes of section 5 (10) of this Act.
- (3) If all of the moneys referred to in subsection (2) of this section are not allocated by the Emergency Board prior to December 1, 1994, on that date such moneys become available for any other purpose for which the Emergency Board lawfully may allocate funds.

SECTION 54a. If Senate Bill 93 becomes law, sections 1 and 2, chapter _____, Oregon Laws 1993 (Enrolled Senate Bill 93) are repealed.

SECTION 55. Nothing in this Act authorizes the transfer of the Domestic Violence Fund established pursuant to ORS 108.610 to 108.660 to the State Commission on Children and Families.

SECTION 56. This Act being necessary for the immediate preservation of the public peace, health and safety, an emergency is declared to exist, and this Act takes effect on its passage.

Passed by House June 17, 1993

Repassed by House August 2, 1993

Ramona J. Kenady
Chief Clerk of House

Larry Combs
Speaker of House

Passed by Senate August 2, 1993

Phil Beall
President of Senate

Received by Governor:

.....M....., 1993

Approved:

.....M....., 1993

Barbara Roberts
Governor

Filed by Office of Secretary of State:

.....M....., 1993

Phil Keeling
Secretary of State

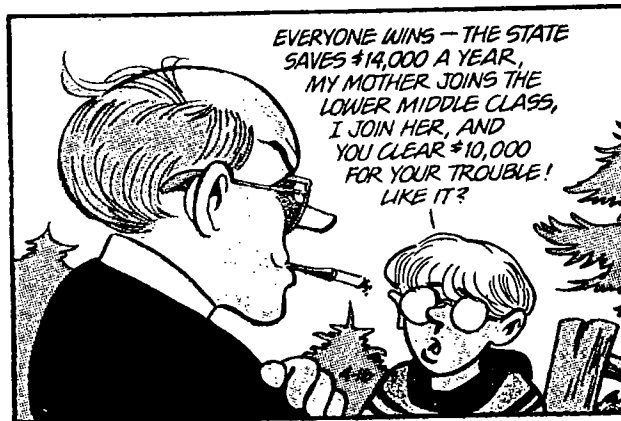
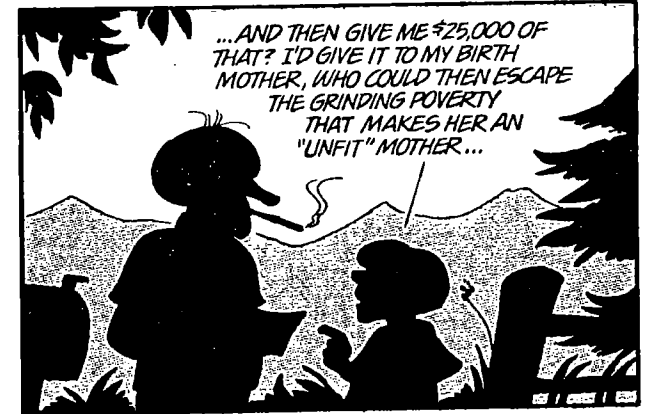
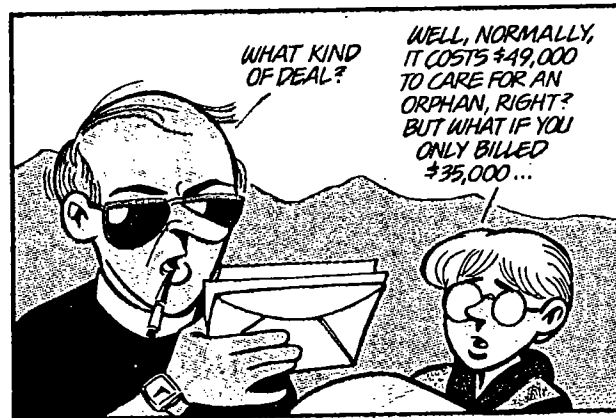


This is not the Oregon Welfare Reform plan. . . .

The Washington Post, April 16, 1995

DOONESBURY

By Garry Trudeau



WORKSHEET
SMALL GROUP WORK WITH WAIVERS

Solution or Symptom?
Learning Larger Lessons from Oregon's Many Waivers from Federal Statutes

EACH TEAM HAS TWO TASKS

Your first task is to understand your waiver.

What are the basics about your waiver? For example:

What federal law (or regulation) is being waived?

What Oregon department or agency applied for the waiver?

What federal agency granted the waiver?

Where did the waiver come from? Why did Oregon seek the waiver in the first place? What was the problem with the federal law?

Just what does the waiver do—and to whom? Who gets waived from what federal requirements?

Who is affected by the waiver (people, institutions, levels of government)?

What did it take to get the waiver? Time? Effort? Money? Political clout?

Beyond the basics. . . Are people and systems doing anything differently as a result of the waiver? Or are there better results? For example:

Was the waiver worth the effort? Why or why not?

What are the costs and benefits of the waiver from the state's point of view?
Did the waiver cost the state or the federal government money? Did it save money? Or did it mean that money was used more effectively?

How effective has the waiver been? Any evaluations? What examples of results are there?

Add anything else that someone would need to know to understand the waiver.....

Your second task is to identify lessons learned from this waiver—either lessons specific to "your" waiver or more general lessons. For example:

Is the waiver a solution or a symptom? to what? of what?

What do we learn from waivers about the complexity of the system and how well the current system works?

Are more—or fewer—waivers needed?

What are the politics of waivers? (Republican and Democrat? Executive Branch and Legislative Branch? Budget?)

What lessons/principles are applicable to other areas? What are the implications for other programs?

What are the lessons across laws/fields?



NORTHEAST WORKFORCE CENTER

Program Summary

Targeted Neighborhood Strategy

The Mayor's Office, the Northeast Coalition of Neighborhoods, and City Bureaus, including the Police Department, will be targeting efforts to help residents re-establish control in their own communities, block-by-block, door-to-door. This effort also includes coordination with Multnomah County and The Private Industry Council. The Targeted Neighborhood Strategy creates an opportunity to be proactive by closely linking employment and social service activities to this process in order to have a long term impact. This fifteen-month pilot project of door-to-door outreach to provide employment-related information, referral and recruitment will be accomplished by increasing the case management capacity of the Northeast Workforce Center (NWC).

Goals & Objectives

Goal 1: **To increase workforce development outreach services to individuals in the targeted area.**

1. Work in collaboration with partners on workforce issues through an integrated approach with the Police Bureau and social service providers.
2. Increase the number of inner north/northeast target area residents placed in jobs through a coordinated effort of workforce development partners.
3. Convene a meeting of the workforce development partners on a monthly basis to facilitate better coordination and case management for individuals that have been identified as needing services and develop programs and strategies that remove the barriers that prevent individuals from seeking and maintaining viable employment.

Goal 2: **To identify and increase training opportunities for north/northeast residents.**

1. Establish priorities and strategies to meet the training needs of residents in coordination with local education and workforce partners.
2. Pilot a work-based training program with Portland Development Commission (PDC) using HUD Enterprise Zone training funds.
3. Increase the number of targeted north/northeast residents who will complete basic skills or work-based training through the Skill Center.



NORTHEAST WORKFORCE CENTER

Northeast Workforce Hotline Fact Sheet

Background

The northeast Portland community, through the North-Northeast Economic Development Alliance and the Portland Chamber of Commerce, has formed a community/business partnership to develop a strategy to combat adult unemployment in inner-north/northeast Portland.

Centerpiece of the effort is the Northeast Workforce Hotline, an "employer hotline" that for the first time will provide a single point of access for employers wishing to hire inner-city adults, particularly minorities. This hotline will be based at the Northeast Workforce Center, which has provided job placement, vocational training, job counseling, and information and referral services for as many as 2,000 adults in N/NE Portland.

Participating Agencies

Partners in this program include: Northeast Workforce Center, the Urban League of Portland, the State of Oregon Employment Department, Portland Development Commission, the Private Industry Council, Portland Community College, and Adult & Family Services.

The Hotline: Rationale

The hotline is designed to assist new employers in every way possible to easily identify and recruit new workers. Companies using the hotline will be linked with qualified candidates from a broad network of local agencies involved in job training and placement that have worked for months to develop a coordinated system of screening and referrals.

How it Works

The Northeast Workforce Center will accept calls from companies who have specific employment openings and wish to hire qualified workers from north and northeast Portland. Information about each job opening will be recorded and made available to the partner agencies through an electronic bulletin board system provided by Portland Development Commission's JobNet.

Location

Northeast Workforce Center is located at 739 N. Killingsworth in Portland and operates daily from 8:00 a.m. to 5:00 p.m., Monday through Friday. The Northeast Workforce Hotline number, for employers interested in hiring inner-city adults, is 240-5425.

For more information, contact Jennie Portis at NWC at 240-5342.



NORTHEAST WORKFORCE CENTER

PROJECT PURPOSE

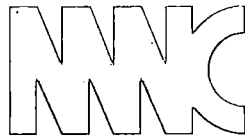
The goal of the Northeast Workforce Center (NWC) is to actively assist residents of north/northeast Portland to obtain economic self-sufficiency through employment, effectively utilizing existing services. A secondary goal is to identify unmet needs related to employment.

The Center is a service which connects and coordinates existing services related to employment for north/northeast residents. The Center provides information and referral services to residents and agencies, including referrals for daycare, alcohol and drug treatment, and other family maintenance needs; tracks and advocates for clients as they participate in employment and training services; and will identify gaps in the delivery systems residents need to attain economic self-sufficiency through employment.

Additionally, the Center, located on the campus of Portland Community College, works with the PCC Skill Center to recruit students for the vocational training programs: Business Clerical and Building Trades, supplemented by Professional Development, Adult Basic Education and GED components.

The Northeast Workforce Center Project was developed through extensive discussion among north/northeast community leaders and agencies providing employment training and placement services, including Portland Community College, the Portland Development Commission JobNet program, The Private Industry Council, the Urban League, and the State of Oregon Employment Department. Tri-Met, as the key component in transportation to support economic development of the area, has played an active role in the development of the Center. The Metropolitan Exposition-Recreation Commission, the City of Portland, and the State Economic Development office, through its Lottery Fund Allocation, have also supported the Center.

The Center is designed to address both the employment needs of north/northeast residents and the workforce needs of employers throughout the metropolitan area. As described above, inner north/northeast residents need jobs which provide a "family wage" and fringe benefits. The work of JobNet and the Employment Department suggests that there are also employees experiencing difficulties in filling positions which meet both the "family wage" and fringe benefit criteria. Clearly, problems exist which prevent the smooth connection of residents in need of such employment with employers in need of workers.



NORTHEAST WORKFORCE CENTER

FACT SHEET

The Northeast Workforce Center targets inner north/northeast Portland, an area severely impacted by unemployment and economic disinvestment. The area's major business arterials, Martin Luther King Jr. Boulevard, and the Williams/Vancouver corridor are lined by empty buildings and severely undercapitalized small businesses.

Reliable unemployment data for north/northeast residents does not exist (particularly data which includes "discouraged workers"). However, it is generally estimated that unemployment in this area is at least twice that in the overall metropolitan area and significantly higher for minority youth. Inner north/northeast Portland houses the core of Portland's black community. Black residents comprise 56.7% of the area's population. Hispanics, Native Americans, and Asians comprise 12.3% of residents making inner north/northeast the most racially diverse of all Portland neighborhoods.

Both the Northeast Economic Development Alliance, a coalition of community leaders and organizations, and the Neighborhood Revitalization Management Panel, a coalition of the City of Portland, Multnomah County, Portland Public Schools, the Housing Authority of Portland, the Chamber of Commerce, and United Way, have identified the urgent need for economic development and employment in the target area of north/northeast Portland. The city and state have designated an Enterprise Zone within the area, and recognized six neighborhoods within the area as target areas eligible for Housing and Community Development funding.

Employment is a critical element in the revitalization of the north/northeast area. Neighborhood business development and improved housing stock require fully employed residents for ongoing support and growth. Without jobs at "family wages" for north/northeast residents, the economic development of the community cannot proceed.



NORTHEAST WORKFORCE CENTER

Program Summary

The **Northeast Workforce Center (NWC)** is a service which connects and coordinates existing services related to employment and training for north/northeast residents. The Center provides information and referral services to residents and agencies, including referrals for daycare, alcohol and drug treatment, and other family maintenance needs; tracks and advocates for clients as they participate in employment and training services; and will identify gaps in the delivery systems residents need to attain economic self-sufficiency through employment.

Agency Profile

<u>We Serve:</u>	Adults - 18 years and older (Target boundaries Inner N/NE)	
<u>We Provide:</u>	Career counseling Case management Vocational training (PCC Skill Center) Job placement assistance Information and referral component = 30%	
<u>We Refer To:</u>	A wide variety of employment supportive resources	
<u>We Limit Service By:</u>	Priority = N/NE Residents	
<u>We Get Clients From:</u>	Word of mouth/friends = 65% Direct referral, agency networks, drop-ins = 25%	
<u>Minority Clients:</u>	70%	
<u>N/NE Clients:</u>	95%	
<u>Intake:</u>	Number of residents seen from 7/90 - 12/94: Average number of contacts per client = 3	2,732
<u>Information & Referral:</u>	Number of referrals to employment opportunities emergency services such as training programs, daycare, legal assistance, utilities, etc.	8,000
<u>Job Placement:</u>	Number of hires ending 12/94:	645

The community-based design of the Northeast Workforce Center has emphasized coordination of delivery for existing services in order to avoid duplicated effort, simplified program access for clients, and identification of barriers to employment and service gaps which prevent the economic empowerment of those clients being served. A significant beginning has taken place during the past years as the Northeast Workforce Center has taken the leadership role in bringing agencies together in cooperative relationships as well as in shared efforts on behalf of north/northeast residents.

What are the specific activities for which funds are requested?

The Northeast Workforce Center is made up of the following staffing components which require funding:

- NWC acts as the client recruiting, screening and assessment arm of the Portland Community College Skill Center and its training programs. Staff of NWC provide advocacy and counseling for trainees as well as job-search support and placement assistance in addition to long-term follow-up for placements after completion of training.
- NWC provides job placement and referral services available to all NWC clients. Staff of NWC provides job-search technical assistance, employment history evaluation, job readiness evaluation, job-search counseling and support, and job referral.
- NWC provides information and referral for support services through a computerized data base. Staff of NWC assesses client needs, defines who might be able to meet those needs, identifies needs which are not being met, and resource gaps.
- NWC staff has recently begun a process to identify ways in which unmet needs can be measured, approaches evaluated, and systems developed to solve those areas which serve as barriers to employment. Some of these barriers identified by staff are:
 - Lack of liability insurance for driver's license
 - Lack of transportation subsidies, bus tickets
 - Lack of work clothing
- Community/Business Partnership Adult Strategy: Implements strategies developed jointly by The Northeast Economic Development Alliance and the Portland Chamber of Commerce to better access employment opportunities for adult residents of northeast Portland and African Americans in particular. Included in the strategies are an employer hotline (located at the Center), further development of coordinated efforts among existing service agencies, improved and extended client information systems which provide common measures of client activities and service effectiveness, and various public information sharing events designed to build action networks between the northeast community and private sector business.

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- P2 Relating to the appointment to Federal office [(a)(2) of the PRA]
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- P4 Release would disclose trade secrets or confidential commercial or financial information [(a)(4) of the PRA]
- P5 Release would disclose confidential advice between the President and his advisors, or between such advisors [(a)(5) of the PRA]
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- b(4) Release would disclose trade secrets or confidential or financial information [(b)(4) of the FOIA]
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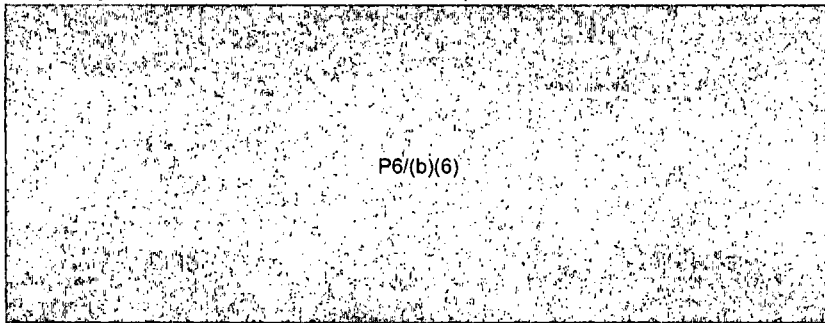


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Mary Ann Thompson, In Mobile



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