

WELCOME TO OREGON!

CONTENTS OF YOUR INFORMATION FOLDER

Inside Front Pocket	Portland Tourist Information Name Tag
A.	Short Agenda Long Agenda Map of Meeting Places
B.	Site Visit List
C.	Meeting Attendance Lists
D.	Cluster Background Papers
E.	The Oregon Option - Executive Summary
Inside Back Pocket	Oregon Tourist Information Portland Map Spirit of Portland Brochure and Ticket

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A

Divider Title: _____

The Oregon Option
Portland, Oregon
September 18 - 21, 1994

Monday Morning, September 19

Time	Event	Hosts/Location
7:00 - 8:30	Breakfast Get Acquainted/Get Organized	Mayor Katz/Chair Stein The Heathman Hotel SW Broadway & Salmon
8:30 - 1:30	Site Visits	Various

Vision

Monday Afternoon

Time	Event/Location	Presenter/Facilitator/Location
1:30 - 2:15	Plenary Session Insights from the Field Lessons Learned	Chuck Dimond Justice Center, Portland SW 2nd and Main Enter from 2nd and go to 14th Floor Conference Room
2:15 - 3:00	Oregon Benchmarks Overview Values and Principles Questions and Answers	Duncan Wyse
3:00 - 3:15	Break	
3:15 - 4:15	Small Group Discussion Values and Principles Reach Consensus on 3	Barbara Dyer
4:15 - 4:45	Report Back	Barbara Dyer
4:45 - 5:15	Electronic Voting	Chuck Dimond

5:15 - 5:30	Summary on Principles and Values to Guide Memo of Understanding	Barbara Dyer
5:30	Notes for Tuesday/Recess	Chuck Dimond

Monday Evening

6:30 - 9:30	Willamette River Dinner Cruise Spirit of Portland	SW Front Avenue Between Yamhill and Taylor--near Salmon Springs Fountain
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Benchmarks and Strategies

Tuesday

Time	Event	Presenter/Facilitator/Location
7:30 - 9:00	Continental Breakfast	Justice Center, Portland
9:00 - 10:15	Plenary Session Leadership Perspectives The Benchmark Story	Gov. Barbara Roberts Mayor Vera Katz Comm. Bev Stein Comm. Randy Franke Kevin Concannon Cam Preus-Braly
10:15 - 10:30	Break	

(Conference participants will spend the bulk of the remainder of the day in sub-groups. Your Benchmark Cluster or sub-group assignment is contained in your registration packet. If you have any questions consult one of the conference staff. Box lunches will be served at your sub-group work site which will be announced.)

10:30 - 2:00	Diagnostic/Barriers Facilitated Benchmark Clusters Family Stability Early Childhood Health Workforce Training Cross-Cutters	Connie Green Jeff Luke Kathy Turner Barry Crook
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2:00 - 5:00	I.D. Necessary Action Steps I.D. Necessary Process Steps Electronic Voting Rank Action Steps: Easy/Medium/Hard Electronic Voting Rank Process Steps: Urgent/Important/Nice But Not Essential	
5:00 - 5:15	Break	
5:15 - 6:15	Plenary Session Benchmark Cluster and Sub-Group Reports	Chuck Dimond Justice Center, Portland 14th Floor Conf. Room
6:15 - 6:30	Notes for Wednesday Recess	Chuck Dimond

Tuesday Evening

7:00 - ???	Bridgeport Pub	1313 NW Marshall
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Conclusions

Wednesday Morning

Time	Event	Presenter/Facilitator/Location
7:30 - 8:00	Continental Breakfast	Justice Center
8:00 - 10:15	Plenary Session Review Action/Process Steps (Break-out groups to be announced.)	Barbara Dyer Justice Center
10:15 - 10:30	Break	
10:30 - 11:30	Review Memo of Understanding	Barbara Dyer
11:30 - 11:45	Evaluation of Conference	Kathy Turner/Jeff Luke
11:45 - 12:00	Closing Thoughts	
12:00	Adjourn	

THE OREGON OPTION

INTERGOVERNMENTAL TEAMS WORK SESSION

September 19 - 21, 1994

OREGON OPTION PURPOSE:

To develop and test a model for an intergovernmental system that:

- ▶ Shifts accountability from a procedure-driven to an outcomes-driven model;
- ▶ Respects and supports local/county/state determined outcomes when they do not conflict with the national interest;
- ▶ Brings local, county, state and federal partners together as enablers and problem solvers, not controllers and barrier builders;
- ▶ Brings local, county, state and federal systems and resources into alignment.

WORK SESSION OBJECTIVES:

- ▶ To achieve consensus on the principles which will guide this new intergovernmental system.
- ▶ Begin to identify specific barriers imposed by the current intergovernmental system.
- ▶ Begin to develop a relationship that will enable intergovernmental partners to solve problems as strategies are employed and barriers emerge over time.
- ▶ Identify next immediate steps, and a longer term workplan which the intergovernmental partners commit to.

WORK SESSION OUTCOMES:

By noon Wednesday, the intergovernmental partners will have developed:

- ▶ A clear understanding of the Oregon Benchmarks;
- ▶ A draft memorandum of understanding that specifies the principles and establishes the framework for this new intergovernmental model;
- ▶ An initial list of specific barriers to begin working on;
- ▶ A detailed action plan.

THE OREGON OPTION

INTERGOVERNMENTAL TEAMS WORK SESSION

SESSION ONE: Monday Breakfast, 7:00 - 8:30
The Heathman Hotel

PURPOSE: Welcome, Get Acquainted & Get Organized

FORMAT: Welcome from Mayor Katz & Chair Stein
Group Introductions
Facilitator & Group Go Over Agenda

PREP: Review agenda and session descriptions.

THE OREGON OPTION

INTERGOVERNMENTAL TEAMS WORK SESSION

SESSION TWO: Monday, 8:30 - 1:30
Site Visits

PURPOSE: To view the intergovernmental system from the perspectives of the customer and the service provider.

To begin to identify problems and opportunities in intergovernmental system.

FORMAT: Participants will split into smaller groups. Each group will visit two sites. Participants will meet with customers, service providers and other government officials.

PREP: As you visit these various sites keep these questions in mind:

- ▶ What "people" results are intended from this program/strategy/system?
- ▶ What is the program/strategy/system actually set up to achieve?
- ▶ What works? What doesn't? Why? What should change?

THE OREGON OPTION

INTERGOVERNMENTAL TEAMS WORK SESSION

SESSION THREE: Monday, 1:30 - 2:15
Insights From The Field
Foundation For Memorandum of Understanding

PURPOSE: Drawing from the lessons of the morning site visits, participants will begin to identify principles and values to guide a results-driven intergovernmental system.

FORMAT: Full group facilitated work session.

PREP: Morning site visits.

PRODUCT: Roughed out, expansive ideas on principles & values.

THE OREGON OPTION

INTERGOVERNMENTAL TEAMS WORK SESSION

SESSION FOUR: Monday, 2:15 - 3:00
Oregon Benchmarks

PURPOSE: To clarify what the Oregon Benchmarks initiative has accomplished so far, and to highlight the values and principles driving the effort.

FORMAT: Duncan Wyse presents followed by full group conversation.

PREP: Review Oregon Option briefing paper & overview of Oregon Benchmarks.

THE OREGON OPTION

INTERGOVERNMENTAL TEAMS WORK SESSION

SESSION FIVE: Monday, 3:15 - 4:15
Small Group Session
Framework, Principles & Values
Building The Memorandum of Understanding

PURPOSE: To develop and refine the roughed-out product of session three.

To reach consensus within small groups about the framework, principles & values which will be incorporated into the memorandum of understanding.

FORMAT: Small group facilitated work sessions.

PREP: Review first draft of memorandum of understanding.

PRODUCT: Written statement of framework, principles & values

- *Identify principles MOST IMPORTANT TO NEW INTERGOVERNMENTAL PROCESS*
- *identify similarities and differences*

THE OREGON OPTION

INTERGOVERNMENTAL TEAMS WORK SESSION

SESSION SIX: Monday, 4:15 - 5:30
Full Group Discussion & Vote
Framework, Principles & Values
Building The Memorandum of Understanding

PURPOSE: To determine where the group agrees and disagrees, and what needs more work.

FORMAT: Group reports.
Full group facilitated review & discussion.
Electronic voting.

PRODUCT: Consensus Elements for Memorandum of Understanding.

THE OREGON OPTION

INTERGOVERNMENTAL TEAMS WORK SESSION

SESSION SEVEN: Tuesday, 9:00 - 10:15
Benchmark Clusters
Leadership Perspectives

PURPOSE: To understand Oregon's leaders' vision and planned strategies for achieving benchmarks.

FORMAT: Full group conversation with Governor Barbara Roberts, Portland Mayor Vera Katz, Multnomah County Chair Bev Stein, Marion County Chair Randy Franke, Oregon Department of Human Resources Director Kevin Concannon and Administrator of the Oregon Workforce Quality Council Cam Preus-Braly.

THE OREGON OPTION

INTERGOVERNMENTAL TEAMS WORK SESSION

SESSION EIGHT: Tuesday, 10:30 - 5:00
Benchmark Clusters
Building An Action Plan

PURPOSE: To identify the intergovernmental opportunities and barriers within each cluster group. To identify actions that would build on the opportunities and/or eliminate the barriers. To identify process steps necessary to build a new federal/state partnership.

Participants will:

- ✓ Share detailed information about vision and strategies within each cluster.
- ✓ Clarify and reach consensus about assumptions
- ✓ Identify specific opportunities and barriers.
- ✓ Identify actions and process steps.

They will rank actions as:

- ▶ Easy
- ▶ Medium
- ▶ Hard

and process steps as:

- ▶ Urgent
- ▶ Important
- ▶ Nice but not essential

FORMAT: All Participants will divide into three cluster teams in the morning:

- ▶ Family stability
- ▶ Early childhood health
- ▶ Workforce training

At 2:00 pm members from each cluster group who deal with cross-cutting finance and management issues will leave their group to form a fourth team. A fifth group on data will also work separately from 2:00 to 5:00 p.m.

PRODUCT: Actions and Process Steps identified and ranked.

THE OREGON OPTION

INTERGOVERNMENTAL TEAMS WORK SESSION

SESSION NINE: Tuesday, 5:15 - 6:30
Benchmark Clusters
Plenary Session

PURPOSE: To review progress across cluster teams.

FORMAT: Full group reporting and conversation.

THE OREGON OPTION
INTERGOVERNMENTAL TEAMS WORK SESSION

SESSION TEN: Wednesday, 8:00 - 10:15
Detailed Workplan

PURPOSE: To detail next steps, and to determine the mechanism for carrying the work forward. Participants will define tasks, determine who will take the lead on which tasks and develop a meeting schedule.

FORMAT: Cluster groups. Full group discussion to determine that everyone has an understanding of next steps across clusters and across levels of government. To see where workplans can be useful across clusters.

PRODUCT: Workplan

THE OREGON OPTION

INTERGOVERNMENTAL TEAMS WORK SESSION

SESSION ELEVEN: Wednesday, 10:30 - 11:30
Working Group Report on Memorandum of
Understanding

PURPOSE: To review new draft.

FORMAT: Full group reporting and conversation.

THE OREGON OPTION

INTERGOVERNMENTAL TEAMS WORK SESSION

SESSION TWELVE: Wednesday, 11:30 - 12:00
 Assessment/Conference Conclusion

PURPOSE: To determine what went well and what didn't
 work about the process, the substance and the
 facilities. Final thoughts.

FORMAT: Full group conversation.



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B

Divider Title: _____

barriers:
jobs

Roosevelt Center

1942

1600 residents

'88 drive-by shooting

prompted integrated

service delivery police/social services

Surveyed door to door

asking people why they
wanted in their neighborhood
to be safe?

1) drug treatment on sight

2) Oregon literacy -

3) child care

4) grocery store - 6 1/2 miles away - are in process of establishing grocery store

5) Oregon extension to teach

"SNACK ATTACK"

↳ teaches kids to make food from what's available

6) gym that had changed

but was made available

7) security patrol by residents

Sheriff's dept. started foot & bike patrol.

Judy - came in '88

Sara - Portland School system
"social worker/direct
service provider"

Paul Parker -
Community Services project -
project could do a better job of partnering
with residents.

Contract with
- housing authority maintenance
- bringing DARE on sight.

If you surveyed today,
what would the answer be.

education, training,
child care, transportation.

Royl Sunderland -

nutrition - extension service

responsible for ongoing training/

education in nutrition.

Oregon State Univ. extension

implemented - "snack attack"

"master gardener" program - extension
program for growing food.

9.19.94

Roosevelt High School

Family Resource Center - located in high school but serves elementary, ^{and middle school}
emphasis on family advocacy vs. direct service provider.
(intervene on behalf of families).

school to work transition - involves all students.

- 1) health service
- 2) manufacturing technology
- 3) natural resource
- 4) human services
- 5) arts & communication
- 6) bus ~~communication~~ communication

Career pathways

- work based learning component.
- program begins freshman year.
- students graduate with at least entry level skills in one of the 6 areas.
- measure decrease drop out rate

* teen health clinic also located in same building.

barriers:

- confidentiality
- large # of children who "drift"

THE OREGON OPTION INTERGOVERNMENTAL TEAMS WORK SESSION

SESSION TWO: Monday, September 19
 8:30 - 1:30
 Site Visits

PURPOSE: To view the intergovernmental system from the perspectives
 of the customer and the service provider.

To begin to identify problems and opportunities in the
intergovernmental system.

TOUR ASSIGNMENTS:

Federal visitors have been assigned to groups. The number
of each person's assigned tour group is on her/his name
tag.

State and local participants should sign up for a site visit at
the registration table before breakfast. Please note your
tour group number.

Tour leaders and coordinators have been assigned to
groups as noted below. If you have questions about these
assignments, please check with Meganne Steele or Rhys
Scholes.

TOUR START-UP:

After breakfast, please walk outside and go to the vehicle
with your tour group number on the windshield.

Drivers: Please do not leave until you have been given your
final list of tour participants. This will be given to you at the
car/van.

QUESTIONS?:

If you have questions after leaving the Heathman Hotel,
please call Rhys Scholes at 248-3928 or 248-3308.

TOUR GROUPS:

1. Chemeketa Community College, New Workforce Resource Center
McLaren State Training School

Driver: Jessica Marlitt, Mayor's Office, City of Portland
Tour Leader: Toni Peterson, State Dept. of Human Resources
Vehicle: city pool van

Participants:
Pamela Johnson, NPR
Howard Rolston, HHS
Wayne Fawbush, USDA
.....
.....
.....

2. Maya Angelou Site
Walnut Park
Elliot Neighborhood

Driver & Tour Leader: Carol-Linda Casson, Portland Devel. Comm. (PDC)
Vehicle: PDC van

Participants:
Martha McLelan, PDC
Colleen Acres, PDC
Cynthia Taeuber, Commerce
Glenn Kamber, HHS
Armando Quiroz, Regional DoL
Hazel Fiers, Education

3. Marion County Health Centers
Child Health Initiative Project

Tour Leader: Jeff Davis, Marion County Health
Driver: Anne Bremmer, Multnomah County Health
Vehicle: city pool car

Participants:
Kristen Kracke, NPR
Talmira Hill, Education
.....
.....

4. Northeast Workforce Skills Center
Mt. Hood- PCC Dislocated Worker Program

Driver & Tour Leader: Lisa Neisenfeld, Portland Development Comm.
Vehicle: private mini-van

Participants:
Suzanne Stoiber, HHS
Beverly Godwin, NPR
.....
.....

5. Caring Community, Harold Oliver Resource Center
Eastwind
P.A.L, -- McCoy Academy Alternative School

Driver & Tour Leader: Sharron Kelley, Multnomah County Commissioner
Vehicle: city pool car

Participants:
Maruta Zitans, HHS
Tom Plewes, DoL
Steve Bauer, City of Portland, Office of Finance & Administration
.....

6. North Portland Health Clinic, WIC Program
School Health Clinics (Jefferson)

Driver & Tour Leader: Tom Fronk, Multnomah County Health Division
Vehicle: city pool car

Participants:
Michael Dalich, DoJ
Barbara Dyer, Alliance for Redesigning Government
Bunnee Butterfield, HHS
.....

7. Touchstone Program at Ockley Green School
Target Cities

Driver & Tour Leader: Gary Hansen, Multnomah County Commissioner
Vehicle: city pool car

Participants:
John Whitney, HHS Regional
Alma Hobbs, USDA
.....
.....

8. Partners Project, Childrens' Managed Mental Health Care
Riles Center & regional acute care coordination program overview

Driver & Tour Leader: Eileen Deck, Multnomah County Community &
Family Services Division
Vehicle: city pool car

Participants:
Shirley Watkins, USDA
Norwood Jackson, OMB
David Garrison, HHS
.....

9. CARES Program
MDT (Child Abuse Multi-disciplinary Team)
Multnomah Legal County Aid

Tour Leader: Dan Saltzman, Multnomah County Commissioner
Driver: Meganne Steele, Multnomah County Chair's Office
Vehicle: city pool car

Participants:
Jonathan Bruel, OMB
Astrid Merget, HHS
.....

10. Community Corrections West District Integrated Services Office:
Literacy Program, Day Reporting Center, Community Service
Program, Domestic Violence Program, and Parole & Probation

Tour Leader: Cary Harkaway, Multnomah County Community Corrections
This is a walking tour!

Participants:
Steve Henigson, HHS
Margaret Dunkle, Institute for Educational Leadership

.....
.....

11. Steps to Success, Mt. Hood Community College

Driver: Ken Otto
Tour Leader: Maureen Casterline
Vehicle: private car

Participants:
Olga Trujillo, DoJ
Mitch Geasler, USDA Extension Service

.....
.....

12. Iris Court
King Facility
Portland Community College Workforce Skills Center

Driver & Tour Leader: Lt. Derrick Foxworth, Portland Police Bureau
Vehicle: Police Bureau Van

Participants:
Rose Shandrow, HHS
Jean Peelan, National Performance Review

.....
.....

13. Portland Impact
David Douglas Safety Action Team
Brentwood-Darlington Safety Action Team

Driver & Tour Leader: Joanne Pasco, Multnomah County Sheriff's Office
Vehicle: private car

Participants:
Bill Butz, Commerce
Dick Brinck, HUD
.....
.....

14. Beaverton Employment Department Field Office, Dislocated Worker
Program, Touchstone Kiosk Demonstration
Sabin Occupational Skills Center

Tour Leader: Pinky Dale, Mt. Hood Community College (will meet at site)
Driver: Tom McClellan, Oregon Employment Department (OED)
Vehicle: city pool car

Participants:
Pam Matson, OED
Douglas Dodge, DoJ
Carla Nuxoll, Education
.....

15. PIVOT
Parent Education Center

Tour Leader & Driver: James Edmondson, Multnomah County Children's
Mental Health Program
Vehicle: city pool car

Participants:
Anne Berblinger, Commerce
Barbara Davis, DoE
Bell Bennett
.....

16. Multnomah County Corrections Health Services, Justice Center
Multnomah County alcohol & drug treatment programs in the jails

Tour Guides: Kathy Page
This is a walking tour!

Participants:
Janice Jackson, Education
Ed Martin, HHS
.....
.....

17. Columbia Villa
Roosevelt Family Resource Center

Driver & Tour Leader: Norm Monroe
Vehicle: city pool car

Participants:
Kathi Way, Domestic Policy Council
Lorraine Change, DoL
Bernard Kelly, HHS Regional
.....

OROPT917

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C

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- ▶ **Oregon Progress Board & Staff**

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City Commissioner Blumenauer
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Matthew Prophet
Oregon Progress Board

Barbara Roberts
Governor of Oregon
Chair - Oregon Progress Board
State Capital Building, 254 State Street
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City of Portland
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Portland, Oregon 97204

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Housing
City of Portland
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Administrative Law Judge
Oregon Employment Department

William Scott
Oregon Progress Board

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Oregon Progress Board

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City of Portland, City Auditor
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Project Manager
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Oregon Progress Board

Brett Wilcox
Oregon Progress Board

Diane Williams
Oregon Progress Board

Bill Wyatt
Portland-Multnomah Progress Board
Oregon Business Council
1100 SW Sixth
Portland, OR 97204

Duncan Wyse
Executive Director
Oregon Progress Board
775 Summer Street, NE
Salem, Oregon 97310

OREGON OPTION MEETING - ATTENDANCE LIST

- ▶ **State of Oregon Staff**
- ▶ **Multnomah County Staff & Elected Officials**
- ▶ **Local Agencies**

Ann Abel
The Oregon Consortium
JTPA - 27 Oregon Counties

Roger Applegate
Alcohol & Drug Manager
Marion County Health Division

Ken Auto

Ron Basset-Smith
Oregon Employment Department
Salem Employment Office

Roger Bassett
Commissioner
Oregon Office of Community Colleges

Martha Bennett
Senator Mark Hatfield's Office

Bell Bennette
Community Development

Shari Black, MD
Multnomah Co. Health Department

Gary Blackmer
Multnomah County Auditor

Bill Braley
Office of Prof. Technical Education
Oregon Department of Education

Ann Bremmer
Multnomah Co. Health Dept.

Ken Brooks
Portland Executive Board

Ken Brooks

Sue Cameron
OR Commission Children & Fam./AOC
Tillamook County

Craig Campbell
Juvenile Justice
Oregon Health Div./ D.H.R.

Bob Cantine
Executive Director
Association of Oregon Counties

Carol-Linda Casson
North/Northeast Programs Director
Portland Development Commission

Maureen Casterline

Donna Clark
Asst. Admin/Child & Fam. Health
Oregon Health Div./ D.H.R.

Dennis Cole
Private Industry Council
Multnomah - Washington Counties

Tanya Collier
Commissioner
Multnomah County

Kevin Concannon
Director
Oregon D.H.R.

Barry Crook
Planning & Budget Director
Multnomah County

Jeff Davis
Director
Marion County Health Department

Eileen Deck
Community & Fam. Srvc. Div.
Multnomah County

Chuck Dimond
Director
Partners for Human Investment/PSU

Bob Donough
Director
Tri-Co. Youth Srvc. Consortium

Marcia Douglas
Public Schools Liason
City of Portland

Barbara Dyer
Alliance for Redesigning Government

Bill Easley
State JTPA Admin. Unit
Oregon Economic Development Dept.

James Edmondson
Children's Mental Health Program
Multnomah County

John Egge
Reinventing Welfare Task Force

Janis Elliot
Child Care Administrator
Oregon Employment Department

Derrick Foxworth
Lieutenant
Portland Bureau of Police

Randy Franke
Chair
Marion County Commission

Tom Fronk
Multnomah Co. Health Department

David Fukes
Edgefield Children's Center

Joanne Fuller

Gordon Fultz
Executive Assistant
Association of Oregon Counties

Vickie Gates
Administrator
Oregon Health Plan

Mike Gleesen

Connie Greene
Chemeketa Community College

Gary Hansen
Multnomah County Commissioner

Cary Harkaway
Mult. Co. Community Corrections

Gregg Harpole
Office of Prof. Technical Education
Oregon Department of Education

Grant Higginson
Manager, Child & Adol. Health Prog.
OR Health Div./D.H.R.

Sue Hildick
Legislative Director
Senator Mark Hatfield's Office

Jono Hildner
Director, Human Resources
Clackamas County

Tamara Holden
Director
Mult. Co. Community Corrections

J.D. Hoyer
Office of Prof. Technical Education
Oregon Department of Education

Norma Jaeger
Alcohol & Drug Treatment
Multnomah County

Ruth Johnson

Barry Kast
Dir. Mental Health & Dev. Dis.
Oregon Dept. Human Resources

Sharron Kelley
Commissioner
Multnomah County

John Lattimer
Legislative Fiscal Officer
Oregon State Legislature

Sondra Lippman
Fiscal Analyst
OR Dept. of Human Resources

Bob Lobbe
Office of Medical Assistance Programs
OR Dept. of Human Resources

Margie Lowe
Administrative Services
State of Oregon

Ellen Lowe
Oregon Ecumenical Ministries

Jeff Luke
Pub. Pcly & Planning Mngmt. Dept.
University of Oregon

Neil Main

Pam Mattson
Director
Oregon Department of Employment

Tom McClellan
Oregon Employment Department

Theresa McHugh
Assistant Director
OR Dept. Administrative Srvc.

Mike McKracken
Executive Director
Mental Health Programs

Donna Middleton
Director, Human Resources
Polk County

Judy Miller
Oregon Department of Education

Marlis Miller

Stephen Minnich
Administrator, Adult & Human Srvc.
Oregon Human Resources Dept.

Norm Monroe
Staff Assistant
Office of the Chair-Multnomah Co.

Cathy Moravec
Oregon Employment Department
Oregon City Employment Office

John Mullen
Human Resources Department
Clackamas County

Jim Neely
Ass. Administrator
Oregon Adult & Family Services

Lisa Nisenfeld
Job Net Program Manager
Portland Development Commission

Dick O'Connor
Chair, Reg.15 Workforce Qual. Committee
Clackamas County

Kris Olson-Rogers

Kathy Page

Tony Palermi
Superintendent
David Douglass School District

Joanne Pasco
Multnomah County Sheriff's Office

Toni Peterson
Service Integration Manager
OR Dept. Human Resources

Lorenzo Poe
Director
Multnomah Co. C.S.D.

Cam Preus-Braly
Admin. Workforce Quality Council
OR/Office of Educ. Pley. & Plan.

John Radford
Administrator
State Controllers Division

Dan Saltzman
Commissioner
Multnomah County

Bill Scott
Director
OR Economic Development Dept.

Mike Shrunk
District Attorney's Office

Kevin Smith
Governor's Office

Donna Stark
Anne E. Casey Foundation

Beverly Stein
Chair
Multnomah County Commission

Allie Stickney
Sr. Policy Advisor to the Governor
Director, Planned Parenthood

Anna Street
,

Rex Surface
,

Stephanie Sussman
"Steps to Success" Program
Mt. Hood Community College
,

Barbara Taylor
Minority Health
Oregon Health Division
,

Jean Thorne
Dir. Medical Assistance Programs
Oregon D.H.R.
,

Bernie Thurber
Oregon Legal Services
,

Kay Toran
Director, Oregon Childrens Services Division
Department of Human Resources
,

Dick Townsend
League of Oregon Cities
,

Kathy Turner
Program Manager
Partners for Human Investment
,

Don Wagner
,

Diane Walton
Director
OR Children & Fam. Commission
,

Ed Weeks
University of Oregon
,

Debbie White
Manager, JOBS Program
Oregon D.H.R.
,

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FAX (503) 581-5115
Voice/TDD 373-1220

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Governor
Chair

GUSSIE McROBERT
Vice Chair

RONALD L. DANIELS

DAVE FROHNMAYER

THEW W. PROPHET
AM C. SCOTT

ED WHITELAW

BRETT WILCOX

DIANE WILLIAMS

DAN SIMMONS
Ex Officio

DUNCAN WYSE
Executive Director

September 18, 1994

To: Oregon Option
Participants

From: Duncan Wyse

Attached are position papers covering each of the Benchmark Clusters under consideration at this conference. They are not official policy statements. They are intended as background and briefing materials--starting points for the discussions that will unfold over this week.

We hope you find them helpful and stimulating as we begin building a more productive state and federal relationship.

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OREGON OPTION MEETING**SEPTEMBER 18-21, 1994****DRAFT****SUNDAY, SEPTEMBER 18**

Meeting registration in hotel lobby 4:00 - 6:00 pm.

Registration packet to include tourist information, background materials, meeting agenda, maps of meeting places, meal tickets. Pre-paid charge of \$60.00 includes three breakfasts and one dinner cruise.

Feds will have dinner in Cluster Groups on their own.

7:PM MEETING IN LOBBY

MONDAY, SEPTEMBER 19

7:30 - 8:30 Welcome Breakfast
Mayor Katz and Chair Stein
The Heathman Hotel

8:30 Leave for Site Visits

8:30 - 1:30 Site Visits
OR Hosts (2)
Feds (3)
Lunch

1:30 - 5:00 Oregon Values Survey
Electronic Polling/Selection of Urgent Benchmarks
Duncan Wyse, Oregon Progress Board
Justice Center Room

6:30 - 9:30 Dinner cruise on the Spirit of Portland

TUESDAY, SEPTEMBER 20

7:30 - 8:00 Continental Breakfast
Justice Center
Mayor Katz, Chair Stein, and other local officials

8:00 - 10:00 Local presentations
Beginning of MOU discussions

10:00 - 2:30 Break Out Groups

List of Groups:
Lunch to be brought in at sites

3:00 - 4:00 Governor Barbara Roberts
4:00 - 6:00 Break Out Groups (if necessary)
7:00 - ? Bridgeport Pub

DRAFT

WEDNESDAY, SEPTEMBER 21

7:30 - 8:00 Continental Breakfast
Justice Center
8:00 - 10:00 Reports of Break Out Groups
10:00-12:00 Wrap Up
12:00 Adjournment

9/12/94
3:45 pm PST

VisionMonday AfternoonChuck Dimond Moderates

Time	Event	Presenter/Facilitator
1:30 - 1:45	Welcome/Agenda	????/Dimond
1:45 - 2:15	Contex/Big Picture	Barbara Dyer
2:15 - 3:15	Oregon Benchmarks Overview Values & Principles Questions & Answers	Duncan Wyse
3:15 - 3:30	Break	
3:30 - 3:40	Small Groups	Kathy Turner
3:40 - 4:10	Small Groups Develop List of up to 3 Values & Principles	Kathy Turner
4:10 - 4:30	Report Back	Kathy Turner
4:30 - 4:50	Summary on Principles ▶Agree ▶I can live with it ▶I have a better idea	Kathy Turner
4:50 - 5:00	Summary on Principles & Values to Guide Vision	Kathy Turner
5:00 - 5:15	Break	
5:15 - 6:15	Review Memo of Understanding Work Team Assigned/Staff	Barbara Dyer/Duncan Wyse
6:15 - 6:30	Overview Tuesday Agenda Announcements	Chuck Dimond
6:30	Recess	

MONDAY MORNING - SITE VISIT

16 groups -

OREGON WILL MAKE ASSIGNMENTS for site visits -

Benchmarks and StrategiesTuesday

Time	Event	Presenter/Facilitator
8:00 - 8:15	Open & Review of Monday Work & Memo (if necessary)	Chuck Dimond
8:15 - 9:30	Leadership Perspectives Benchmark Clusters Vision/Strategies/Stories	Mayor Vera Katz Comm. Beverly Stein Comm. Randy Franke Director Bill Scott
9:30 - 9:45	Break	
9:45 - 11:00	Diagnostic/Barriers Facilitated Benchmarks Clusters Family Stability Early Childhood Health Workforce Training	(Dyer/Turner & others)
11:30 - 12:00	Group Discussion	Chuck Dimond
12:00 - 12:30	Break/Lunch	
12:30 - 5:00	Reconvene in cluster Groups	(clusters are facilitated sup-groups on their own)
12:30 - 2:00	I.D. Service Delivery Changes	
2:00 - 3:30	Discussion/Electronic Voting	(working to make electronic voting available to all groups might adjust times)
3:30 - 5:00	Develop On-Going Process Steps	
5:00	Recess	

Conclusions
Wednesday Morning

Time	Event	Presenter/Facilitator
8:00 - 8:15	Review of Earlier Work Today's Agenda	Chuck Dimond
8:15 - 9:45	Reports from Clusters & sub-groups	Chuck Dimond
9:45 - 10:00	Break	
10:00 - 10:15	Review Memo of Understanding	Barbara Dyer/Duncan Wyse
10:15 - 10:45	Small Group Discussion of Memo Missing Parts? - Consensus	Kathy Turner
10:45 - 11:10	Report Back Discussion	Kathuy Turner
11:10 - 11:30	Vote on any added items Prioritize Process Steps	Chuck Dimond
11:30 - 11:40	Next Steps	Barbara Dyer/Duncan Wyse
11:40 - 11:50	Summary of Morning Work	Kathy Turner
11:50 - 12:00	Thanks/Closing Remarks	???
12:00	Adjourn	

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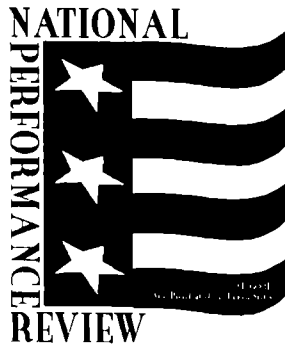
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FAX TO: FEDERAL ACTION TEAM
Kathi Way, DPC 456-7028
David Garrison, HHS, 690-5672
Astrid Merget/Glen Kamber, HHS, 690-8252
Lorraine Chang, DoL, 501-4811
Judy Wurtzel/Ken Tolo, DoEd, 401-3095
Reggie Robinson, DoJ, 514-0468
Shay Bilchik, DoJ, 514-6897
Michael Stegman/Maureen Kennedy, HUD, 619-8000
Alma Hobbs, USDA, 720-9366
Linda Trageser, Commerce, 482-3361
Jonathan Breul, OMB, 395-6974
Joe Wholey, OMB, 395-7294
Steve Redburn, OMB, 395-1307
Woody Jackson, OMB, 395-3952
Armando Quiroz, DoL/Seattle, 206-553-0098
Buck Kelly, HHS/Seattle, 206-615-2087
John Gregrich, ONDCP, 395-6744

FROM: Kristen Kracke

SUBJECT: Partnership for Results -- The Oregon Option
NEXT MEETING IS TUESDAY, SEPTEMBER 13, 3:00-5:00 PM AT NPR

Minutes from the meeting on September 6, 1994 are attached.

NOTE: THE FEDERAL TEAM HAS DECIDED TO MEET IN THE LOBBY OF
THE PORTLAND INN AT 6:00 PM ON SUNDAY, SEPTEMBER 18 FOR
CLUSTER DISCUSSIONS.

PLEASE MAKE TRAVEL ARRANGEMENTS ACCORDINGLY

Partnership for Results -- The Oregon Option
Federal Interagency Action Team Meeting
September 6, 1994
3:00 - 5:00 pm

Draft Minutes

NEXT MEETING: Tuesday, September 13, 1994
3:00-5:00 pm
National Performance Review
750 17th Street, Suite 200

ACTION ITEMS FOR TEAM MEMBERS:

- 1) Please review the attached draft MOU and FAX comments to Jonathon Breul at (202) 395-6974 by COB Friday.
- 2) The following information is still needed for the confirmed list of participants.
Please FAX this information to Kristen Kracke at 632-0390 by 10:00 am Tuesday, September 13 . For *every Headquarter and Regional staff* from your agency who will be going to Oregon, please send:

Name
Title and Agency
Address
Phone number
Fax number

Cluster Area of Interest

Any special needs, accessibility or dietary restrictions

HANDOUTS:

- o Draft outline for MOU by Oregon
- o Draft MOU by Jonathon Breul
- o Participant List for Site Visit (By Agency and By Cluster)
- o USDA Youth at Risk -- Oregon 1994 Annual Report; Oregon 1995 Plan of work Update

ATTACHMENT:

- o Draft List of Clusters (Participants, Agencies, and Federal Convener)

AGENCY PRESENTATION:

HHS: Glean Kamber presented the HHS internal analysis.

Family Stability: HHS stated they needed to know a lot more about strategies before able to get into any more specifics and requested Oregon develop an evaluation strategy. HHS listed potential programs and suggested other benchmarks such as divorce rates. HHS also suggested that benchmarks focus not only on the negative aspects but also on positive indicators.

Child Health: HHS summarized the Oregon proposal under child health as a general wish to consolidate programs with flexibility for state to come back to federal government with outcomes -- with the 50% medicaid match, in particular, HHS has a general fund and can't do it.

Overall, HHS has concern that the benchmarks are too focused on children alone and not enough on families.

SITE VISIT:

Federal Participation List is attached. Connie Revell, Oregon, stated that the Oregon Progress Board was meeting September 8 to further develop site visit plans, agenda, and the list of state and local participants. Connie provided a brief description of some of the persons and agencies Oregon was planning to invite.

This list includes the following: State Health Officer, Chief Budget person, County Health Officials, Child Care Division representative, Medicaid Administrator, Welfare Chief, County Commissioners from the Commission on Children and Families, Assistant Superintendent for State Workforce Quality Council, Vital Statistics staff, Governor Roberts, Portland Mayor Katz, and Multnomah County Chairperson Bev Stein.

Federal cluster conveners have been identified for each cluster (see attached list). *Conveners agreed to coordinate a meeting with federal members prior to site visit.*

Connie Revell reported that Oregon planned to provide professional facilitators from "Partners for Human Investment" for each cluster team during site visit working sessions.

MEMORANDUM OF UNDERSTANDING:

The Federal team reviewed a draft outline of an MOU from Oregon (handout) as well as a

draft MOU from Jonathan Breul, OMB (handout). Jonathan prepared the draft building from the Oregon outline and from other Oregon MOUs on the forestry plan and environmental clean up.

Questions raised included: "Who should sign?"; "What will be the mechanical process for the group?"; and "Do we need a Hold Harmless clause?".

Kathi Way, DPC, stated she saw the site visit as useful in filling in many details and next steps, however, she stated consistent representation during these early development meetings was more crucial than structure because structure will likely change significantly after site visit. Jonathon Breul stated the "hold harmless" clause is already built into authorities.

The group agreed that federal government cannot pledge to merge funds up front. In general, the group agreed the MOU should be kept broad and should clearly define purpose and key principles but should not outline specific strategies.

Specifically, the purpose should clearly state the focus on "Results". Principles should be further outlined. Data could be included under responsibilities or under a separate section. A general timeline (length of partnership demonstration) as well as a list of participating entities (possibly as a separate category) was suggested.

In addition to the general purpose and principles outlined in the MOU, an implementation plan and other attachments could be included as separate but supporting documents. These attachments could be developed and refined as needed over the learning process with a few specific short-term strategies outlined during the site visit.

The group agreed the MOU should serve as a boiler plate and should not be viewed as the "deal cutter".

PREPARATION FOR BRIEFING POLICY OFFICIALS:

The federal team agreed the MOU will serve as the general statement of intent to participate and will be the primary document to present to policy officials. The briefing will serve two primary purposes: 1) status report to principals on what the federal team has done, and 2) provide recommendations/options in order to get consensus on "Next Steps".

In addition to the MOU, the federal team may want to present progress and recommendations/options on the barrier map and the initial benchmark areas, and any implementation plans or strategies for immediate short-term action, and process for longer term action.

Kathi Way suggested the Domestic Policy Council might be used as the forum for briefing principals. Kathi will discuss this option with Carol Rasco and report back to the group.

GENERAL DISCUSSION:

The federal team asked Oregon whether School Year Benchmarks were still under consideration for clusters. Education affirmed their interests in these outcomes and Oregon agreed to include the benchmarks. It was agreed that the school year benchmarks would fit most appropriately under the Workforce Development cluster.

Census announced plans to coordinate a meeting with the statistical community during the site visit.

Partnership for Results -- The Oregon Option

September 18-21 Site Visit Participation

BY CLUSTER

Healthy Children Cluster:

NPR: Pamela Johnson (program - AID)

Commerce: Cynthia Taeuber (data)

HHS: Suzanne Stoiber (program - PHS)
Maruta Zitans (policy)
John Whitney (regional, program - PHS)
Rose Shandrow (regional, program - HCFA/Medicaid Ops)

DoJ: Douglas Dodge (program)

USDA: Shirley Watkins (program - FNS)

Family Stability Cluster Workgroup:

NPR: Kristen Kracke (program)

Education: Janice Jackson (program)

Commerce: Bill Butz (data)

HHS: Astrid Merget (policy) *
Howard Rolston (policy - ACF)
Bunnee Butterfield (regional, program - ACF)
Glenn Kamber (policy)

USDA: Science and Education designee

HUD: Dick Brinck (program - field office)

Workforce Development Cluster Workgroup:

Education: Talmira Hill (policy/program)

HHS: Steve Henigson (regional, program - ACF)

DoL: Tom Plewes (data)
Lorraine Chang (program) *
Armando Quiroz (regional)

Commerce: Anne Berblinger (regional)

USDA: RDA designee

* Ken Tolo and Lorraine Chang will co-convene

Generic, Cross-Cutting Workgroup:

DPC: Kathi Way (policy) *

NPR: Beverly Godwin (policy)
Jean Peelan (legal)

OMB: Jonathan Breul *
Norwood Jackson (finance/audit)

Education: Hazel Fiers (finance/audit)

DoJ: Michael Dallich (program)
Olga Trujillo (legal)

HHS: Ed Martin (finance)
Dave Garrison (policy)

USDA: Alma Hobbs (program)

DoE: Barbara Davis (information technology)

Other: Barbara Dyer, Alliance for Redesigning Government
Margaret Dunkle, Institute for Educational Leadership

Rotate Among Workgroups:

HHS: Buck Kelly (regional)

Education: Carla Nuxoll (regional)

* Convener of Cluster Team

i:\stlocal\oregon\minutes.906

EARLY CHILDHOOD HEALTH

Janice Elliot
Child Care Administrator

Jean Thorne
Director
Office of Medical Assistance Programs

Grant Higginson
Manager
Child & Adolescent Health Program

Diane Walton
Director
Children & Families Commission

Sue Cameron
Tillamook\State CCF

Randy Franke
Commissioner
Marion County

Marilyn Lewis
Fiscal, Health

Judy Miller
Dep. of Ed.

Bell Bennette
Community Development

Mike Skeels, PhD, MPH
Administrator
Health Division

OREGON
Site Visit
Participants

FAMILY STABILITY

Steve Minnich
Administrator
Adult & Family Services

John Egge

Donalda Dodson
Marion County

Florence Toregino
Deschutes County

Allie Stickney
Senior Policy Advisor
Teen Pregnancy
Governor's Office

Kay Toran
Administrator
Children Services Division

Jim Neely

AFS

Bernie Therber

Connie Greene
Chemeketa Community College

Kevin Concannon
Director
Department of Human Resources

Ken Smith
Mental Health

Baruti Arthuri
Director
Housing & Communities Services

Gestavo Wilson
Housing and Community Services

WORKFORCE

Roger Bassett
Commissioner
Office of Community College Services Education

Debbie Lincoln
Community Colleges

Pam Mattson
Director
Department of Employment

JD Hoyer
Professional Technical Ed.

Bill Braly

Gregg Harpole
Technical Education

Debbie White
JOBS

Bill Easley
Administrator
JTPA

Dennis Cole
SDA

Cam Preus-Braly
Director
WFQC

Bob Johnson
WFQC

3-4 Regional WFQC Chairs

Joyce Benjamin
Education

3-4 leading school districts

CROSS CUTTERS

Meagan Steele
Pam Wev
Jessica Marlitt
Bill Scott
Vicky Gates
Teresa McHugh
John Lattimer
Sondra Lippman
Toni Peterson
Sharon Gary-Smith
Ellen Lowe
Bob Cantine
Don Wagner

Agency : U.S. Department of Agriculture

				<u>Internet Address:</u>
Mr. Mitch Geasler	U.S. Department of Agriculture 14th and Independence Avenue, SW Room 211N Washington, DC 20250-0100	Agency Phone	(202)720-4175	<u>mgeasler@es USDA.gov</u>
		Agency Fax	(202)720-5437	
Ms. Alma Hobbs	Deputy Administrator for Youth Development U.S. Department of Agriculture Room 3860 South Building AG Box 0904 Washington, DC 20250-0904	Agency Phone	(202)720-853	
		Agency Fax	(202)720-9366	

Agency : U.S. Dept. of Commerce

				<u>Internet Address:</u>
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		Agency Fax	(202)482-3361	
William P. Butz	Associate Director for Demographic Programs Bureau of Commerce Washington, DC 20233	Agency Phone	301-763-5167	
		Agency Fax	301-763-5013	
Loren Casewent	U.S. Department of Commerce	Agency Phone	(202)482-1580	

Agency : U.S. Dept. of Commerce

			Internet Address:						
Mr. Doug Hall	U.S. Department of Commerce 14th and Constitution Avenue, NW Washington, DC 20230								
Cynthia Taeuber	Congressional Associate Bureau of the Census Room 3645-3 Washington, DC 20233	<table border="1"> <tr> <td>Agency Phone</td> <td>301-763-4358</td> <td></td> </tr> <tr> <td>Agency Fax</td> <td>301-763-1254</td> <td></td> </tr> </table>	Agency Phone	301-763-4358		Agency Fax	301-763-1254		
Agency Phone	301-763-4358								
Agency Fax	301-763-1254								
Ms. Linda Trageser	U.S. Department of Commerce 14th and Constitution Avenue, NW Room 5026 Washington, DC 20230	<table border="1"> <tr> <td>Agency Phone</td> <td>(202)482-1975</td> <td></td> </tr> <tr> <td>Agency Fax</td> <td>(202)482-3361</td> <td></td> </tr> </table>	Agency Phone	(202)482-1975		Agency Fax	(202)482-3361		ltragese@doc.gov
Agency Phone	(202)482-1975								
Agency Fax	(202)482-3361								
Marty Welch	Department of Commerce	<table border="1"> <tr> <td>Agency Phone</td> <td>(202)482-3181</td> <td></td> </tr> <tr> <td>Agency Fax</td> <td>(202)501-3024</td> <td></td> </tr> </table>	Agency Phone	(202)482-3181		Agency Fax	(202)501-3024		MWELCH@NJ.NOAD.GOV
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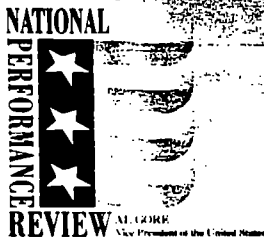
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National Performance Review

750 17th St. NW
Box 101
Washington, DC 20006

Sept. 9, 1994

To: Federal Statistical Community

From: Pamela Johnson, NPR

Subject: Summary of August 30, 1994 Meeting with Federal Statistical Community
On the Oregon Benchmarks and the Oregon Option

Summary: On August 30, Duncan Wyse, Executive Director of the Oregon Progress Board, presented a briefing on the Oregon Benchmarks and Oregon Option to members of the federal statistical community. He described some of the data-related challenges that Oregon faces and requested the support of the community in measuring and achieving Oregon's benchmarks. Bev Godwin of NPR reported on federal plans to support the Oregon Option and on the activities of an Interagency Action Team. The group concluded that:

- 1) Federal data sources are already used by Oregon in substantial ways to measure progress on their benchmarks;
- 2) The federal statistical community is willing to provide additional support;
- 3) Representatives of the various statistical agencies would provide comments on Oregon Benchmarks and their data needs; and
- 4) Oregon would identify its priority needs for assistance and support in the data area.

Introduction: Pamela Johnson, NPR, opened the meeting, thanking the participants for their interest and willingness to attend. She noted that Oregon's interest in outcome measurement is part of a larger trend toward outcome measures that is a challenge to, and opportunity for, the federal data community. In addition to Oregon and other state-level benchmarking activities, the Government Performance and Results Act, the National Performance Review, performance agreements, customer service standards and measures, and greater interest in outcome measures in the budget process are all part of this larger trend.

Benchmarking and the State of Oregon: The Director of Oregon's Progress Board, Duncan Wyse, described the statewide process by which Oregon had begun with a strategic plan in the late 1980's and evolved into a set of common benchmarks that they are committed to achieve. Benchmarks - - for example reduction of teenage pregnancy, increase in educational skill levels and increase in family stability (Ref: Oregon Benchmarks) - - were developed through a statewide process with the involvement of the legislature, governor, localities, businesses and citizens. They are being used to guide program, policy and resource allocation decisions by the Governor, the state legislature, county commissioners, foundations, and others. Wyse also described the role of the Oregon Progress Board which was established by the legislature, is chaired by the governor, and issues a report card on the benchmarks every two years.

Oregon's data needs: Representing Oregon, Duncan Wyse expressed interest in cooperation with members of the federal statistical community to measure progress on their benchmarks. He noted that Oregon is already benefiting from federal data for many of their benchmarks and from federal technical assistance, for example from the Centers for Disease Control. The Oregon Progress Board conducts a biennial survey of 45 benchmarks to supplement existing information.

Wyse described Oregon's vision of a data-rich system that would focus government on achieving results and would be available to the state and local entities to support governance. The Progress Board disaggregates all data that it can to the local level. However, many benchmarks cannot yet be disaggregated.

Wyse identified several areas where the federal government could support Oregon's efforts: additional data, including assistance filling "holes" and supply of comparative data from other states; further analysis of data for other administrative levels (e.g. county); an opportunity to piggyback on existing data collection efforts; and assistance in methodological development of data collection devices and indicators.

Oregon is also interested in obtaining information on best or "promising" practices from various state and local governments on how best to achieve certain benchmarks. He paraphrased President Clinton that "There's no problem in America that someone isn't solving right now." However it is difficult for a state such as Oregon to keep abreast of what all the states and localities are doing. For example, what are the best approaches to reducing teenage pregnancy nationwide? Transferring this knowledge to states and localities is an ideal role for the federal government to play.

Wyse expressed the need for low cost approaches, saying that Oregon had found that it was sometimes more expensive for states to piggyback on a federal survey than it was to do their own. He cited a literacy survey as an example.

The Federal Response to Date: Bev Godwin, NPR, described a July 25 meeting chaired by Secretary Shalala at which the Governor of Oregon, the Mayor of Portland and the Executive of Multnomah County presented a proposal to the federal government that we join in a long-term (8-10 year) partnership to achieve these benchmarks. "The Oregon Option" proposal received enthusiastic responses from Secretary Shalala and others in attendance (OMB Director Alice Rivlin; Carol Rasco, DPC; Elaine Kamarck, OVP; and deputy or assistant secretaries from seven federal agencies). An interagency action team is meeting weekly to plan the federal response. Data needs have not been a major part of these discussions to date. There is a plan to develop a memorandum of understanding to guide the federal/state/local partnership. A working site visit of federal, state and local agencies will be conducted in Oregon September 18-21.

Discussion of Data Issues: There was a discussion of a number of data issues:

- Ken Keppel. HHS, said that Oregon is one of seven states receiving a grant under a Centers for Disease Control Assessment initiative. CDC is working with local health departments and providing basic training in statistics, etc. They are working with Oregon on-line.
- There was a discussion of the need for a much better understanding of contributing factors and new measures in some areas, for example in early cognitive development. Oregon has developed a new survey that will be released in about 2 months assessing children's early (pre-school) development - - on a population not an individual basis.

- Oregon is using education measures that parallel national measures. Wyse noted that Oregon wants to be able to compare itself to national norms and other states as they undergo education reform. He noted that in this area, as in others, defining how to measure a benchmark was a "brain exercise" - you have to agree on what people are really trying to achieve, citing the lively discussion with deans of education on what a B.A. degree means in measurable terms.
- Oregon's benchmarks are measures of societal performance. They are distinct from performance measures which measure organizational performance. Wyse noted that responsibility for most benchmarks is shared among a number of organizations. He also expressed the concern that, without such over-arching benchmarks, it is possible to get lost in a sea of performance measures.
- Tom Plewes noted that the Department of Labor provides funding to state agencies and is looking at the innovative use of administrative records and other methodological issues.
- Kathy Wallman, OMB, underlined the importance of keeping a priority focus on data, noting lessons from earlier efforts to increase state/federal cooperation efforts.

Conclusion: The meeting closed with agreement that a new system of accountability was being proposed, one that depended very heavily on reliable information on social outcomes. This requires a major shift in thinking about accountability, the "set of strings" that are attached to federal funding, and also a concerted effort to get the best information on which to base this new accountability. The participants agreed that:

- 1) Federal data sources are already used by Oregon in substantial ways to measure progress on their benchmarks;
- 2) The federal statistical community is willing to provide additional support;
- 3) Representatives of the various statistical agencies would provide comments on Oregon Benchmarks and data needs; and
- 4) Oregon would identify its priority needs for assistance and support in the data area.

Attachment: Participant List

Pamela.Johnson@npr.gsa.gov

**August 30, 1994 Meeting with Federal Statistical Community
On the Oregon Benchmarks and the Oregon Option
Participant List**

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9/26/94 OREGON

Early Childhood Cluster

- designate single point of contact at highest decision making level
- develop comprehensive list of all parties involved.
- MOU with commitment
- Each Fed. dept identify waivable
- Identify Statutory / Reg. that require change
- Fed. govt. could agree to grant (preference) for OR benchmarks
- Flexibility in medicaid req.
- local funds for match
- decategorization of Chapter 1
- flexibility of SSBG
- feedback to OR on flexible resources and provision of Tech. Asst.

Reduce micromanagement & reporting.

- common definition
- fed. as partners in waiver development
- Fed. team at Fed. level to make change
- Flex. in funding.
- move to outcome reporting
- OR need to resolve issues around confidentiality
- look at other state waiver.
- OR ask for pilots.
- OR provide single point of access for counties.
- OR connect electronically.
- OR do cost/benefit analysis
- pool local funds

WORKFORCE CLUSTER

AGREEMENT -

- 1 - consolidate funding STREAMS
- 2 - Agree on priority benchmark
- 3 - interagency team at Federal level & single point of contact
- 4 - redefine monitoring
- 5 - commitment to quality services

1. Consolidate funding streams

- lead agency at Federal level to be supported by NPR & OMB
- JTPA, Wagner-Pitzer, Carl Perkins, Voc. Rehab, Jobs, UI, ^{Adult} ~~Basic~~ Ed.
- Proposed one funding cycle.
- common definitions
- W/in 6 wks develop Fed/state/local group to put together details

2. Benchmarks

- October conference for OR to further discuss.
- Feds will group to determine ways to support OR.

4. Monitoring/Technical Assistance

- One reporting/review team to look across program lines.
- develop cross-functional/cross-agency team to establish staff train.
- New paradigm based on outcomes-quality review vs. monitoring
- Evaluation based on same funding cycle with timely feedback
- cross functional team
- team for tech. assistance

Family Stability

- Reinvest \$ from welfare savings back to prevention or other welfare related services.
- Redefine eligibility system, establish baseline.
- Merge program eligibility (AFDC, food stamps, housing, etc)
- How to redirect and leverage dollars.
- Review outcomes to assure success with Benchmarks.
- Develop one plan to cover many programs.
- Add to AFDC outcomes

CROSSCUTTING/Generic

(attached ~~is~~ in detail)

- Develop infrastructure for solving problems
 - National Economic Council
 - Domestic Policy Council
 - Intergovernmental Audit Forum
 - President's Management Council

- ① High level process
- ② Interagency task force at the front end
- ③ Reach out to Congress
- ④ Common definitions
- ⑤ Common information process to relate to customers
- ⑥ Agree in advance on methodology
- ⑦ Role definition
- ⑧ Restructure accountability systems around outcomes

9.21.94 OREGON

WRAP UP

1

what went well.

- site visits
- building relationships
- Room
- lots of people came from D.C.
- facilitation
- common commitment
- people were open
- Got alot done
- finally learned commitment of feds.

2.

what did not go well

- people didn't know who was here, what their role is & vice versa
- more preparation on common language.
- Needed Inspector General, Congressional, Social Security
- More lead time
- clarity of expectation
- Less process at front end.
- More front end prep from Oregon.

9.21.94 Oregon

What do we need to keep →

- Need to know who is doing what
- Single point of contact
- OREGON NEEDS STATE, LOCAL LEADERSHIP TEAM
- OREGON NEEDS communication/involvement strategy
- Need data and measurement
- NEED OUTREACH TO TRIBES
- NEED TIMELINE - MILESTONES
- NEED Congressional, State legislature, special interest group
- Public commitment from Feds
- Marketing tool
- EASY WAY TO communicate
- STAFF PLAN & RESOURCES for support
- Reward system for innovation
- Intensive training taken to communities



10 COMMON QUESTIONS ABOUT OUR COMMUNITY SCHOOLS

1. What is special about your program?

The community school concept turns public schools into full-service community centers that are open all day, all week, year-round, with on-site health and dental clinics, mental health counseling, child care, extended-day programs, tutoring, adult education, parent workshops, cultural programs and summer camp. The day-time academic curriculum is fully integrated with the before-, after-school and evening programs, and the schools are open to everyone in the community -- children, siblings, teens, parents and other adults.

2. Isn't it expensive?

No. The Society's full-service, full-year program costs less than \$1,000 per child per year. This compares to New York City public school spending of \$6,600 per middle school child for nine months, six hours a day, Monday to Friday. By locating all child and family services in the school facility, schools and agencies also have the opportunity to save, or to direct more of their spending to services. The cost of failure -- welfare, incarceration or chronic ill health -- is far greater than the cost of these preventive services.

3. Who funds the community schools?

The schools are supported by a mix of government reimbursements, private grants and user fees. We anticipate an eventual 50-50 split between public and private funding. Government support would not come from new or additional spending, but from existing funding for health, education, youth and human services, re-channelled to the community school.

4. Why do children need these services in school?

Children cannot learn if they are hungry or sick, and teachers cannot teach if their students are burdened by poor housing, domestic abuse, illiteracy or limited English language abilities. In the community school, children receive the full range of services they need to enter their classrooms ready to learn, and parents get the targeted help they need to support their children's education and healthy growth and development.

--over--

5. *Don't teachers object?*

Just the opposite. Most teachers are eager to be supported and to share responsibility with other professionals and parents. Teachers do object when asked to do everything, without additional help; the community school provides that help.

6. *Who's in charge -- the principal?*

The school principal and the Society's program director are equally responsible for running the community school. Leadership must be shared, with each partner trusting the other, because the schools are open more than 80 hours a week. In these schools, the social service agency is a full partner, not a tenant.

7. *Can only an agency as large as The Children's Aid Society open a community school?*

No. Perhaps only a large agency could launch the first program and demonstrate the full range of potential community school components, but in replication other agencies can select the components that will work best for them or can build from a small program to a larger one. Size is less important than effective collaborations. A small agency in partnership with a Boys & Girls Club or local hospital would provide just as effective leadership for a community school as a large one.

8. *What are the results?*

The community schools are regular zoned schools, with no special selection of either students or faculty. In preliminary evaluations, they have had the highest attendance rates in the district, improved reading and math scores, and no serious incidence of violence. Anecdotally, they have returned a sense of community to the neighborhood, and participation at every level has exceeded expectation. We expect to launch a comprehensive 10-year evaluation this Fall, to document formally the children's academic outcomes and such soft outcomes as improvements in health.

9. *How is the community school program different from other school reform programs such as the Beacon or New Vision Schools?*

There are many new types of alternative schools which contain some elements of our model, but they do not provide the extensive level of comprehensive child and family services in one setting as we do. For example, the Beacon schools often do not have on-site medical and dental clinics. In addition, other models tend to co-locate services, rather than fully integrate them, and they work within existing school structures. We are advocating for a completely new structure, in terms of the role of the public school and the resources available to it.

10. *Is this a model that can really make a difference?*

Yes. The community schools have already attracted national attention. They are being used to design the educational component of the federal "Empowerment Zones," and over 1,000 agencies have already visited the schools and expressed interest in replicating them locally. In Washington Heights, the schools have become the hub of community life; and the community -- from parents and teachers to business, government and police -- has responded by taking a new responsibility for the success and healthy growth of its children.

KEY FEATURES OF THE EVALUATION PLAN

1. Premise

"Outcomes for children will improve if we simultaneously improve their environment (school/family) and their resources (resiliency)."

Our plan is to evaluate the relationships between the nature and activities of the community school and the children's health, educational and psycho-social outcomes.

2. Three primary questions

- What are the program components; were they delivered as planned?
- Did the program affect the children's resiliency?
- How does the program affect education and health outcomes?

3. Thus, a process evaluation, plus an outcome evaluation

Process: *What and how?*

Outcomes: *With what results?*

4. The model itself creates changes in the school environment, but the evaluation considers these as resources, not as outcomes.

Even though the community school creates its own "outcomes" in terms of changes in the school structure, the delivery of services and the working relationships between school and family/community, the only outcomes of interest for purposes of the evaluation are the *measurable changes in children.*

5. To measure changes, the evaluation establishes three comparison groups ...

Aggregate

Classroom cohort

Longitudinal

These schools vs. all city and district schools

Specific classes in these schools vs. contrast schools

Individual children and families over 10 years (*age 20*)

--over--

... and moves from general data to specific:

Aggregate	Comparisons of academic performance
Classroom cohort	Academic performance, plus behavior and health
Longitudinal	Academic, behavior, health, plus "life outcomes"

6. The classroom cohorts will involve three matched pairs of classes ...

Grade 6	600 children (300 + 300)
Grade 4	400 children (200 + 200)
Kindergarten	400 children (200 + 200)

... which will be tested bi-annually over 10 years:

Grade 6	Years 1, 3, 5, 7, 9
Grade 4	Years 2, 4, 6, 8, 10
Kindergarten	" "

7. The longitudinal subset will also be followed bi-annually: 400 children, chosen from cohorts.

8. Short-term outcomes will be reported at the end of year 3.

9. Broad scope implies multiple methods, sources and questions.

The *process evaluation* involves administrators, teachers, social service providers, parents and community leaders, in interviews, focus groups, surveys and observations, on both academic and non-academic components.

The *outcome evaluation* involves standardized and customized tests, including reading, math and language achievement tests, tests developed for previous projects (Comer, Carnegie), parent/student interviews, instruments that measure resiliency traits such as aspirations and self-concept, and health outcomes such as physical growth and medical events.

The *MIS system* is designed to track both *gross numbers* and the *specific details* that identify *what services* are provided to *which* children and families, *when*.
(Systems Designer: Metis Associates)

10. The target population is our partner in the evaluation.

Active participation, advice and consent from school personnel and parents to assure relevance, trust and commitment long-term.

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JUDITH BIRD	H.A.P.	8920 N. WOOLSEY AVE PORT., OR 97203	283-0085
ED HAUSAFUS	MULTIMEDIA CO	8920 N WOOLSEY, PORTLAND	735-1233
Norm Monroe	Office of County Chair	Portland, Oregon 97204	248-3308
Sarah Smith	Portland Public Schools Community Service Project	4412 - N. Trenton Portland, OR 97203	286-1236
SUSAN FRANKS	Columbia Villa/TAMARACK Resident Council	9009 N DANA PORT., OR 97203	289-9372
PAUL PARKER	H.A.P.	4400 N.E. BROADWAY PORTLAND OR 97213	335. 6815
Paul Sunderland	OSU/Mult. Co. Extension Service	211 SE 80th Portland, Ore 97215	ph 254-1500

Name	TITLE	ADDRESS
Cindie Houston	Human Resource 1 (Jobs Unit)	11815 SE Lincoln Pt or 97218
Michael Hille	Human Resource Specialist III	14030 NE Sacramento 97231
DIANE JONES	HRIS 3 Placement	14030 NE Sacramento
Angie Croucher	Operation Manager	E Portland AFS
Connie Johnson	HRIS 3 Case Manager	East Portland
Shirley Valdes	HRIS Reception	East Portland
TRESA KELLOGG	HRIS 3 Case Manager	East Ptd
Mary Clark	HRIS 3 Case Manager	East Ptd
Martha Ventura	HRIS 3 Case Mgr (Bilingual)	East Ptd Branch
Judy Bukowski	HRIS 3	" "
Shirley Siler	Teen Parent Case Mgr	East Portland Branch
Bob Gallucci	Teen Parent Case Mgr	East Portland 1415 SE 122nd
Carolyn Eckel	Operations Manager	" "

(you are great!)

KITCHEN ADD-ONS

ITEM _____

ITEM Pizza 6.25

ITEM Ice tea 1.50

ITEM _____ 7.75

TABLE # _____

WAIT PERSON _____

VQ

DATE <u>7/21</u> 19 <u>94</u> NO. <u>8111</u>	
RECEIVED OF <u>Kathryn Wright</u>	
ADDRESS <u>101 - 2nd St</u>	
FOR <u>STAY INVT</u> \$ <u>16.00</u>	
HOW PAID	BALANCE DUE
<u>CASH</u>	<u>0.00</u>
TOPS FORM 46820 ©	
BY <u>Randy Johnson</u>	

THE HEATHMAN HOTEL
PORTLAND, OREGON

Cover

302-

~~734-~~

~~3500~~

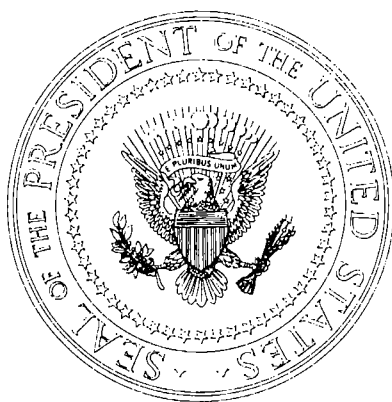
735-

3600

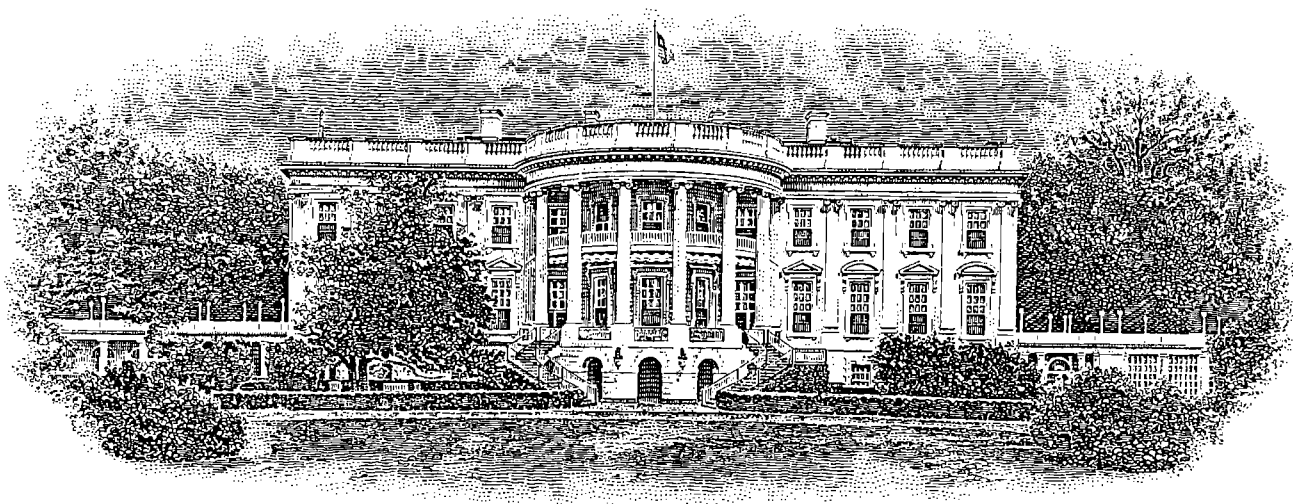


1-800-224-3901

OF PORTLAND



The White House



PHOTOCOPY
PRESERVATION

THE WHITE HOUSE
WASHINGTON

RECEIPTS

RECEIPTS

Sunday

\$ 7 - shuttle
\$3 60 - food
\$ 13 - dinner
\$ 15 - T-shirt
\$ 5 - tips
\$ 3.50 - snacks
6.00 book
8.00 film/gum

\$ 117.00

Monday

7.00 lunch
4.00 boat

Tuesday

10.00 dinner
5.50 lunch 22.00

Wednesday

\$ 6.00 lunch
10.00 transportation
10.00 dinner

169.50

FROM

STEPHEN C. WARNATH

In Portland

Powell's Bookstore

Japanese Garden

Rose Garden + Zoo

Oregon Museum of Science + Industry
("OMSI")

Willamette River waterfront

Oregon wines are becoming
a big business. There are a
number of wineries between
Portland + Salem.

[White House notecard - blank]

DPC - OCTOBER 24th

HHS ✓

Veterans' Affairs ✓

HUD ✓

Interior ✓

Education ✓

National Service ✓

Labor ✓

ONDCP

Commerce ✓

AIDS

omb ✓

OSTP

Justice ✓

Agriculture ✓

TRANSPORTATION ✓

TREASURY ✓

EPA ✓

ENERGY ✓

NEC ✓

CEA ✓

OCTOBER 24th

$$\begin{array}{r}
 127.50 \\
 35.06 \\
 \hline
 162.50
 \end{array}$$

Monaahan

Sunday

22.50 dinner \$14.00
 30.00 T-shirt 15.00
 30.00 earrings 23.00
 30.00
 15.06

Monday

Lunch \$7.00
 drinks 4.00

Tuesday

dinner \$10.00
 lunch \$5.50

127.50

20.1

338.

Wednesday

lunch - \$6.00

trans. to airport \$10.00

dinner

88.26

$$\begin{array}{r}
 130 \\
 40 \\
 40 \\
 \hline
 210
 \end{array}$$

$$\begin{array}{r}
 332.00 \\
 243.74 \\
 \hline
 88.26 \\
 88.26 \\
 \hline
 1.00
 \end{array}$$

30

EXECUTIVE OFFICE OF THE PRESIDENT
OFFICIAL TRAVEL AUTHORIZATION
(Privacy Act Statement and instructions on back)

1. TYPE OF AUTHORIZATION

- ☒ TDY ☐ Amendment
(Show items amended)
- ☐ Invitational (Non EOP Employees Only) ☐ Relocation

2. Traveler (First name, middle initial, last name)

KATHRYN J. WAY

3. Title of Traveler

Special Assistant to the President
for Domestic Policy

4. AGENCY/DIVISION

DPC

5. Office Phone

456-2334

6. Official Duty Station

Washington, DC

7. ☒ Per Diem

☐ Actual Subsistence (unusual circumstances)*
Rate(s):

8. TRAVEL INFORMATION

PURPOSE: To attend meeting --"Partnership for Results - The Oregon Option"

DATE(S): Travel Begin On 09 / 10 / 94

Travel End On 09 / 22 / 94

ITINERARY: Point of Origin (City, State) Washington, DC

Place(s) of Official Visitation (City, State) Portland, Oregon

Point of Return (City, State) Washington, DC

9. MODE OF TRAVEL

(a) Commercial Transportation

Rail

Air

Coach

Extra Fare*

Coach Tourist

Business *

First Class ‡

X

‡ First Class must have approval of Agency Head or Deputy

(b) Privately Owned Vehicle

Auto

Other

Rate auth
per mile

☐ Determined more advantageous
to government *

☐ For convenience of traveler
NTE common carrier cost

(c) ☐ Gov't Owned Vehicle

(d) ☐ Other (specify)

10. ESTIMATED COST

AMOUNT

Per Diem/Actual Subsistence

\$ 132.00
~~150.00~~

Transportation

366.00

Rental Car

Miscellaneous

75.00

TOTAL

\$ 573.00
~~571.00~~

11. SPECIAL EXPENSE AUTHORIZED

☐ Registration Fees (meeting, training, etc.)

☐ Commercial Rental Car

☐ Excess Baggage not to exceed

☐ Other (Please identify)

12. ADVANCE REQUESTED

\$

(meals and miscellaneous expenses only)

13. * Special Provisions/Remarks (Justification for first class /business /extra fare travel, annual leave enroute, actual subsistence, etc.)

L: 67 M: 30 per day

14(a) Requested by

Kathryn J. Way

15. Accounting data (Appropriation, division, project, vendor number)

1142200 J102A

14(b) I certify that the travel herein was reviewed and determined
to be essential for the accomplishment of agency programs
and missions

Approval Official (Signature and Title)

Carol Rasco, Asst. to the President for
Domestic Policy

Leon Panetta, Chief of Staff

16. Funds are available to defray travel cost specified above

Funds Manager's Certification (Signature)

17. Date

1/2/94

18. Travel Authorization No.

X14LQB

PRIVACY ACT STATEMENT — The information requested is required to document the authorization and reimbursement of the individuals who travel at government expense on official business. Its routine use is restricted to officers and employees of Executive Office of the President agencies for performance of their official duties. Disclosure is voluntary, but failure to provide all or part of the information may delay or prevent authorization of travel. This information is collected under the authority of 31 U.S.C. 66a, 41 U.S.C. 3101, 3102, 3309; and General Accounting Office and General Services Administration policies and procedures.

Instructions for Completing Travel Authorization

- ITEM 1 — Check:
- TDY block if travel is of routine nature by an employee of your agency.
- Invitational block if travel is to be performed by a person who is not employed by your agency.
- Relocation block if authorization is for a person being transferred from or to another geographical locality.
- Amendment block if making change to existing Travel Authorization.
- ITEMS 2 – 6 — Self Explanatory.
- ITEM 7 — Check appropriate box for the type of reimbursement authorized.
List rate or rates applicable.
- ITEM 8 — Provide information on travel itinerary.
- ITEM 9 — Check mode of travel authorized.
- ITEM 10 — Compute cost of per diem or actual subsistence utilizing the information in **Item 10**.
Transportation is cost of airline ticket, privately owned vehicle mileage, or other transportation cost.
Miscellaneous could include rental car, registration fees, taxi cabs, etc.
- ITEM 11 — Check appropriate box for any special expenses authorized.
- ITEM 12 — Complete **only** if an advance of funds is requested.
- ITEM 13 — Space provided for justifications and other miscellaneous information.
- ITEM 14(a) — Signature of Traveler.
14(b) — Signature of Approving Official.
- ITEMS 15 & 16 — Self Explanatory.
- ITEMS 17 & 18 — To be completed by personnel assigning T/A numbers.

The White House
Washington

FAX COVER SHEET

OFFICE OF DOMESTIC POLICY

Old Executive Office Building
Washington, DC 20500
FAX: (202) 456-7028

TO: Kristen Kracke

FAX No. 632-0390

FROM: Kathi Way PHONE: 202-456-2334

DATE: 9-9-94

NUMBER OF PAGES (Including cover sheet) 1

COMMENTS:

Name: Kathi Way
Title: Special Assistant to the President for Domestic Policy
Address: Old Executive Office Building, Room 218
The White House
Washington, DC 20500
Ph: 202-456-2334
Fax: 202-456-7028
Area of Interest: Generic Cross-Cutting

*Sent 9-12-94
10:00 a.m.
Cordell*

ACTION ITEMS FOR TEAM MEMBERS:

- 1) Please review the attached draft MOU and FAX comments to Jonathon Breul at (202) 395-6971 by COB Friday.
- 2) The following information is still needed for the confirmed list of participants.

Please **FAX** this information to Kristen Kracke at 632-0390 by 10:00 am Tuesday, September 13. For *every Headquarter and Regional staff* from your agency who will be going to Oregon, please send:

Name
Title and Agency
Address
Phone number
Fax number

Cluster Area of Interest

Any special needs, accessibility or dietary restrictions

Cookin

I think
you know all
information
except

Cluster of interest:
please forward
+ hwh.
K

Generic
CLASS cutting



Staff:

Judith Mayer - Family Resource
Social Worker
Multnomah County

Judy McArdle - School Social Worker
Portland Public Schools

Fees:

The Center is a cooperative effort
between Portland Public Schools,
Multnomah County, and the Oregon
Department of Human Resources.
There is no fee for services.



Roosevelt Community
Family Resource Center
6941 N. Central St.
Portland OR 97203

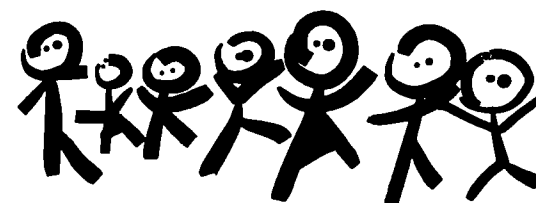


State of Oregon
Department of
Human Resources

Multnomah County

Portland Public
Schools

Roosevelt Community Family Resource Center



*A family center bringing together school,
county, and state social services*

Located in Roosevelt High School
6941 N. Central St.

Enter the building on Ida St. at Hudson
Not wheelchair accessible. Please call for accommodations
(503) 248-3909

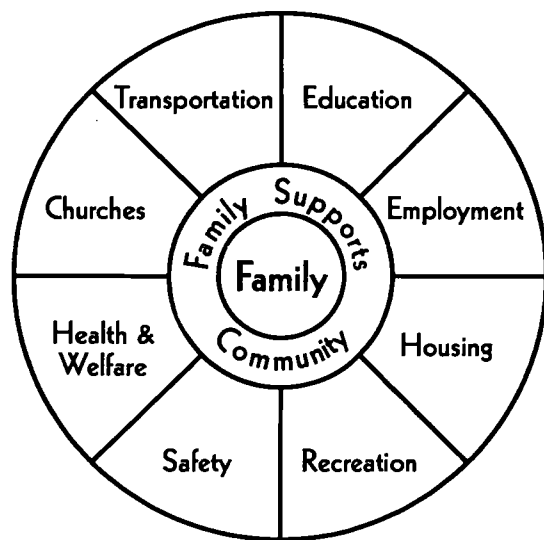
TDD through Oregon Relay System 1-800-735-2900



The Roosevelt Community Family Resource Center provides resource information to families with school age children. The Center is located in Roosevelt High School and serves families in North Portland.

Center staff are available to families as a resource to build on family and community strengths that will increase school success for children and youth.

**The Family Support Circle
is used to identify family and
community strengths that will
support individual and
family growth.**



Contact Us If You:

1. Want information about resources and services in North Portland;
2. Want information about parenting support and classes;
3. Need information about how to get services for you and your family;
4. Would like to talk to the School Social Worker about your child's developmental and educational needs;
5. Want to talk with someone about services your family might need;
6. Know of social services in North Portland and would like to share that information with other families.

Resource Team:

We have a Resource Team available on Tuesdays 1:00 - 4:00 PM.

Staff from the following agencies are available to meet with you and talk about how they might be of help:

Employment

School Social Work

Housing Specialist

Adult and Family Services

Community Health Nurse

Mental Health

Children's Services Division

Disabilities Services

Vocational Rehabilitation

Developmental Disabilities

Please call to make an appointment.

Hours:

8:30 AM. - 4:30 PM.

Monday through Friday

1. Give us a call at **248-3909**
(TDD through Oregon Relay System
1-800-735-2900).

If you get the answering machine please leave a message and we will get back to you as soon as possible.

2. We make appointments at times convenient for you: at the Center; in your home; or at a place of your choice.

