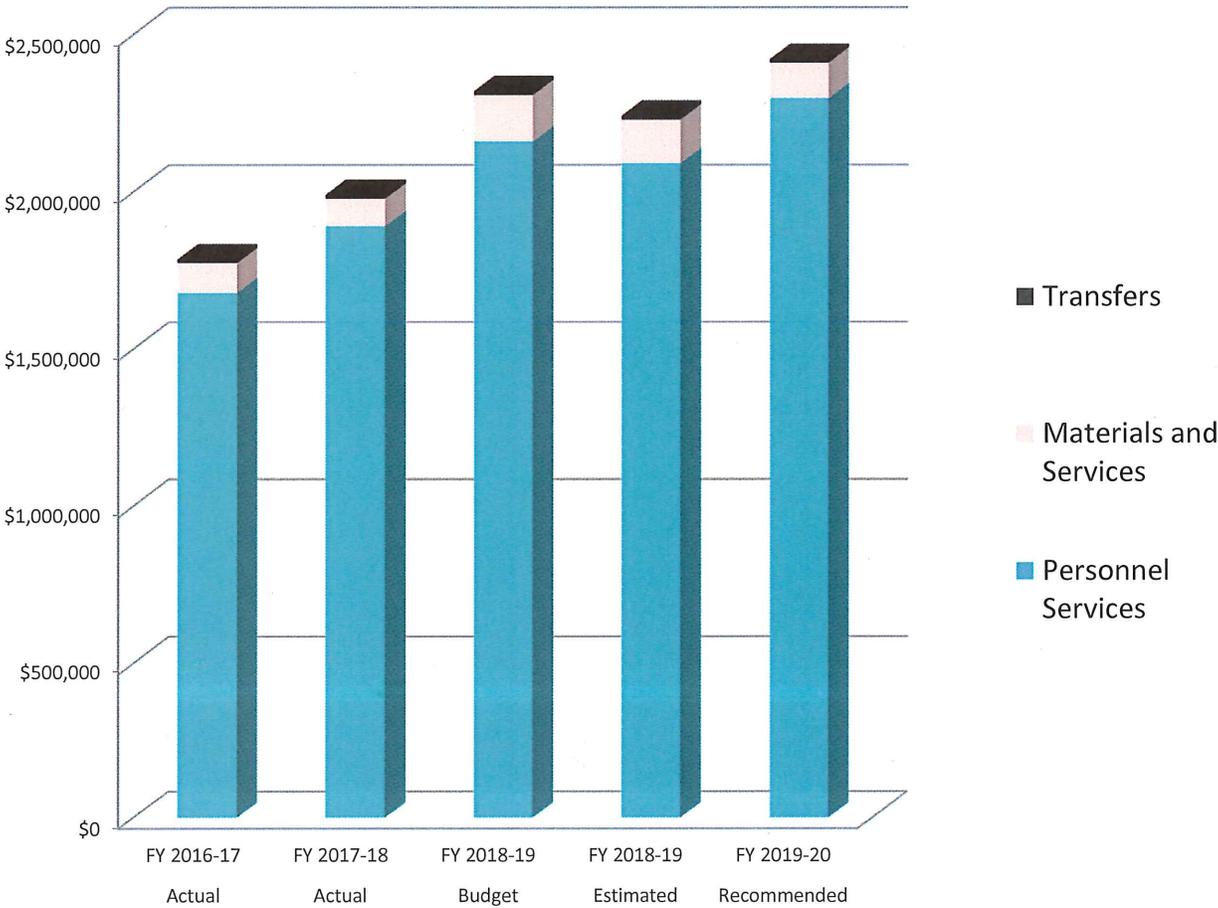


GENERAL FUND
CITY ATTORNEY'S OFFICE
RECOMMENDED FY 19-20



CITY OF BEAVERTON

BUDGET TREND ANALYSIS - FY 2016-17 TO FY 2019-20

With Explanations on Significant Changes between Budgeted 2018-19 and Recommended 2019-20

Fund: **General Fund**
 Department: **City Attorney's Office - Summary**

CLASS	Actual	Actual	Budget	Estimated	Recommended	% Change
	FY 2016-17	FY 2017-18	FY 2018-19	FY 2018-19	FY 2019-20	Budgeted Vs. Recommended
Personnel Services	\$1,678,016	\$1,890,689	\$2,159,950	\$2,090,257	\$2,296,678	6.33%
Materials and Services	95,523	87,826	147,357	138,703	112,589	-23.59%
Transfers	11,494	11,380	11,643	11,643	11,009	-5.45%
SUB-TOTAL	\$1,785,033	\$1,989,895	\$2,318,950	\$2,240,603	\$2,420,276	
Contingency			-		-	
Reserve for equip.			-		-	
TOTAL	\$1,785,033	\$1,989,895	\$2,318,950	\$2,240,603	\$2,420,276	
FTE's	14.85	15.85	15.85		15.85	

Explanation of item(s) that are significant (10% and greater than \$10,000):

Personnel services:

FY 2019-20 reflects step increases, COLA increases for BPA, SEIU, management averaging 2.87% in total, and a 3% VEBA (Voluntary Employees Beneficiary Association Plan) for management and a 1% increase to the VEBA for SEIU. Also shown are an average 0.63% increase in PERS contributions, medical insurance cost increase of 8% for Kaiser, 1.74% increase in MODA plans and 2% increase for Dental.

Materials and services:

FY 2019-20 reflects the elimination of the Harvest Court storage costs.

Transfers:

No Significant Change

CITY OF BEAVERTON, OREGON
FISCAL YEAR 2019-20 BUDGET

FUND: 001 GENERAL	DEPARTMENT: CITY ATTORNEY
DEPARTMENT HEAD: BILL KIRBY	

MISSION STATEMENT:

To provide responsive, high-quality, cost-effective legal, risk and records management services to the mayor, city council, city staff and all the city's departments, agencies, boards and commissions. *(Council Goal #2: Use city resources efficiently to ensure long-term financial stability; #4: Provide responsive, cost-effective service to the community #5 Assure a safe and healthy community; #8 Provide and support a highly-qualified and motivated workforce.)*

REQUIREMENTS	FY 2016-17 ACTUAL	FY 2017-18 ACTUAL	FY 2018-19 BUDGETED	FY 2019-20 PROPOSED	FY 2019-20 ADOPTED
POSITION	14.85	15.85	15.85	15.85	0.00
PERSONNEL SERVICES	\$1,678,016	\$1,890,689	\$2,159,950	\$2,296,678	\$0
MATERIALS & SERVICES	95,523	87,826	147,357	112,589	0
CAPITAL OUTLAY	0	0	0	0	0
TRANSFERS	11,494	11,380	11,643	11,009	0
TOTAL	\$1,785,033	\$1,989,895	\$2,318,950	\$2,420,276	\$0

SERVICES AND TRENDS:

Services

The city attorney's office provides legal counsel and representation to the mayor, city council, city staff and all the city's departments, boards and commissions. Legal advice and counsel is provided on a broad range of matters. These include matters relating to real estate, land use, urban renewal, housing, transportation, public finance, economic development, utilities, franchises, public records, public meetings, grants, contracts, procurements, intellectual property, bankruptcy, collections, ethics, civil rights, labor, employment, torts, risk management, workers' compensation, elections, legislation, the environment, and any other area of law involved in the operations of the city and its related organizations. The office is responsible for drafting the city's contracts, ordinances, resolutions, and real estate transaction documents as well as for managing, filing, and/or defending civil law suits at trial and on appeal.

The office works closely with the police department and prosecutes state and local misdemeanor and violation offenses occurring within the city. The work of the prosecution office includes the filing of complaints, responding to discovery requests, conducting pretrial negotiations, filing and responding to motions, preparing for and attending hearings, court and jury trials, and certain appeals. Cases prosecuted by the city are prosecuted in the Beaverton Municipal Court. The office also employs a victim's advocate partially funded by the State of Oregon to assist victims of misdemeanor crimes.

The office's risk management division identifies, analyzes, evaluates and reduces the impact of risk on the city by managing and administering the city's insurance, safety and loss control programs. The division assists in safeguarding the city from the adverse impact of loss by purchasing insurance, responding to and resolving risk claims, and developing programs, plans and procedures to make the organization safer and more resilient. More information about the division is set out later in this budget document in connection with the Insurance Agency Fund's General Liability and Workers' Compensation programs.

The records management division takes a lead role in managing the information assets of the city. The division's scope of services includes the traditional archiving function that requires the retention and disposition of important city records in accordance with a schedule mandated by the state of Oregon. As well, the division responds to subpoenas, discovery requests, and complex public records requests.

Trends

The city attorney's office workload largely responds to the needs of the organization. Changes in city initiatives, boundaries, municipal court caseload, and relations with other local governments and private enterprises have a direct impact on the office's workload. For example, as Beaverton's population increases, the number of police officers increases, which leads to an increase

CITY OF BEAVERTON, OREGON
FISCAL YEAR 2019-20 BUDGET

FUND: 001 GENERAL	DEPARTMENT: CITY ATTORNEY
	DEPARTMENT HEAD: BILL KIRBY

in the workload for the prosecutors. As the city’s boundaries expand, the office’s civil workload typically expands to include work on annexation agreements, infrastructure agreements, and amendments to the city’s comprehensive plan and/or development code.

A second significant factor affecting the workload in the office is the frequency and scope of public records and discovery requests. In many instances, the requests require legal review. Management of city records is becoming increasingly complex, as legal rights and responsibilities affect the creation, use and transmittal of information through a myriad of technologies. Similarly, the workload of the two city prosecutors and their support staff is affected by the frequency of discovery requests made by defendants for possible use at trial. With the advent of the use of body-worn cameras and the legal prohibition of releasing video showing private information of unrelated third parties, a substantial amount of staff time is spent reviewing video and obscuring certain images for legal or security purposes.

A third significant contribution to the workload of the office is the city’s real estate development efforts. These efforts can involve all the office’s civil attorneys and entail work on negotiating and/or drafting leases, property conveyances, public solicitations and contracts, development agreements, and targeted development incentives. Similarly, when the city simultaneously takes on multiple major construction projects, such as a public safety center, a performing arts center, and a multi-story public parking garage, the office workload increases.

Major trends affecting the city’s risk management program include the consideration of whether the city should self-insure for auto and general liability. The city continues working with its insurance broker to assess the benefits and burdens of self-insurance. Another major trend affecting risk management is the codification of enterprise risk management decision-making standards by the International Organization for Standardization (ISO). These new standards, commonly referred to as ISO 31000:2018, provide a uniform process for assessing and mitigating risks. The city’s current primary insurer, CIS, is encouraging all its clients to use the ISO 31000:2018 decision-making framework to manage risk in their organizations.

Major trends affecting the city’s records management program include the growth of electronic records kept on multiple electronic devices and the city’s increasing use of social media and cloud-based services. The records management program was once a program focused on paper archives, but now the records management unit’s range of services has expanded to include the management of electronic records created and stored on a multitude of devices and responding to a broad range of public records requests, including civil discovery requests and subpoenas *duces tecum*.

BUDGET HIGHLIGHTS:

The city attorney’s office’s FY 2019/20 budget is intended to provide the department the financial resources it needs to continue to provide responsive legal, risk and records management services to the department’s internal and external customers. For FY 2019/20, the office budget is largely a status quo request, except for the following items:

- The legal services division is requesting \$21,396 for a temporary, part-time prosecutor because one of the city prosecutors is expected to be on extended leave in early FY 2019/20.
- The legal services division is requesting \$3,995 to hire a law student full time as a summer intern in May and June of 2020. The hiring would be coordinated through a program of the Oregon State Bar, which is expected to contribute an additional \$2,200 in pay for the law clerk.
- The legal services division is requesting \$4,228 relating to classification and compensation adjustments affecting three staff members.
- The records management division will have two employees working out-of-class in connection with work being done to fully implement the new e-court document management system.

CITY OF BEAVERTON, OREGON
FISCAL YEAR 2019-20 BUDGET

FUND: 001 GENERAL	DEPARTMENT: CITY ATTORNEY
PROGRAM: 0581 GENERAL LEGAL SERVICES	DEPARTMENT HEAD: BILL KIRBY

PROGRAM GOAL:

To provide high-quality, cost-effective legal services to the mayor, city council, city staff and all the city's departments, agencies, boards and commissions.

REQUIREMENTS	FY 2016-17 ACTUAL	FY 2017-18 ACTUAL	FY 2018-19 BUDGETED	FY 2019-20 PROPOSED	FY 2019-20 ADOPTED
POSITION	10.05	11.05	11.05	11.05	0.00
PERSONNEL SERVICES	\$1,258,789	\$1,437,147	\$1,675,885	\$1,742,988	\$0
MATERIALS & SERVICES	62,650	49,375	83,712	68,310	0
CAPITAL OUTLAY					
TRANSFERS	8,815	8,630	8,871	8,257	0
TOTAL	\$1,330,254	\$1,495,152	\$1,768,468	\$1,819,555	\$0

PROGRAM OBJECTIVES:

The city attorney's office is responsible for all the legal affairs of the city. The office represents the city, mayor, and council in affirmative and defensive civil litigation, and administrative and quasi-judicial proceedings. Office attorneys draft and review local legislation, procurement contracts, real estate leases, intergovernmental agreements and other documents and legal instruments. Attorneys in the office advise on policy development and program implementation, advocate and negotiate on behalf of the city, and provide training to elected officials, city boards and commissions, and city employees in a wide variety of areas.

The city attorney's office regularly provides the following services:

- Preparing, reviewing, and editing ordinances, resolutions, policies, procedures, and agenda bills.
- Assisting in negotiating and drafting contracts and agreements with public and private counterparties.
- Working with insurance counsel to provide comprehensive defense of claims covered by insurance.
- Commencing or defending legal actions in appropriate forums to advance and protect city's legal interests.
- Assisting in the advancing the city's legislative agenda before state and federal legislatures and administrative agencies.
- Advising on state and county legal requirements for candidate and measure elections.
- Advising the planning division on all manner of land use issues.
- Providing legal advice and documents for the acquisition, disposition, and redevelopment of property.
- Advising the BURA Board and staff on implementing the Central Beaverton Urban Renewal Plan.
- Advising on the legal requirements for the procurement of goods and services and the construction of public improvements.
- Assisting outside bond counsel in matters relating to the issuance of debt.
- Prosecuting state and local misdemeanor and violation offenses occurring within the city, including the filing of complaints, coordinating discovery requests, responding to evidentiary suppression motions, and conducting pre-trial negotiations, court and jury trials, and certain appeals.
- Providing a victim's advocate for victims of misdemeanor crimes and administering grant funds for that purpose.
- Providing legal training for Beaverton police officers.
- Assisting in negotiating and managing franchises and licenses with utilities operating in the city's rights of way.
- Assisting in the administration of the city's water utility.
- Negotiating collective bargaining agreements.
- Providing legal review and analysis of labor contracts and employment policies.
- Assisting in labor contract grievance arbitrations and other labor law contested cases.

CITY OF BEAVERTON, OREGON
FISCAL YEAR 2019-20 BUDGET

FUND: 001 GENERAL	DEPARTMENT: CITY ATTORNEY
PROGRAM: 0581 GENERAL LEGAL SERVICES	DEPARTMENT HEAD: BILL KIRBY

PROGRESS ON FY 2018-19 ACTION PLAN:

Mayor's Office

- Assist in city efforts to address homelessness in Beaverton.
The office played a major role in drafting the amendments to an existing ordinance the council enacted to allow for safe camping on privately-owned parking lots.
- Provide legal advice and counsel regarding street camping.
The office played a major role in drafting the ordinance the council enacted regarding camping in the public rights-of-way.
- Assist in the implementation of a rental inspection program.
The office is preparing amendments to the city's residential property maintenance code, which sets the standard for residential rental inspections. The work will likely be completed early in FY 2019/20.
- Provide legal assistance in updating city's civil infraction ordinance.
The office will continue to work on revisions as time allows in FY 2019/20.
- Amend city sidewalk code to clarify property owner responsibility for maintaining safe sidewalks.
The office is working with public works department to define the necessary scope of revisions. The work will likely be completed early in FY 2019/20.
- Continue to support activities of the real estate committee.
In addition to serving as a member of this committee that is advisory to the mayor, this office assisted in the negotiation and drafting of: leases and licenses for businesses occupying city-owned buildings; a two-year lease renewal for US Representative Bonamici in-district office; a sublease of city leased space in the Watson Building; and the licensing of city-owned space in The Beaverton Building. The office also provided administrative support for the real estate committee.
- Review and revise as needed the city's payday lender ordinance.
This matter is in process and will come before the city council for discussion and direction in FY 2018/19.
- Support the goals and implementation of Beaverton's Diversity, Equity and Inclusion Plan.
The office is working with human resources department and the mayor's office to revise the city's equal employment opportunity plan, which has received only periodic census updating since it was first prepared nearly 20 years ago. Additionally, an attorney from this office participates in Metro's Construction Career Pathways Project, which is intended to identify strategies for providing reliable career pathways for people of color and women in the construction trades.
- Complete the review and update of the city's regulatory ordinances partially completed in FY 2017/18. These include ordinances related to parking, alarms, background checks, second hand dealers, emergency management, water service, property disposition, license revocation process, code infraction proceeding, nuisance abatement procedures; and council rules.
The office reviewed and updated three parking-related ordinances (camping in the public rights-of-way, parking enforcement procedures, and overnight parking on private parking). The office also completed amendments to the city's second hand dealer ordinance, and real estate disposition ordinance. Review of the council rules is in process and may be completed before the end of FY 2018/19. In addition to the listed ordinances, the office also reviewed and revised ordinances and resolutions to update governance of the human rights advisory commission, bicycle advisory board, diversity advisory board, and library board; drafted an ordinance to update of city's transient lodging ordinance to reflect changes in state law; drafted an ordinance to authorize implementation of certain courtroom security measures in the municipal court; wrote an ordinance to amend the city's inventory of persons in custody ordinance; and prepared an ordinance amending the city's election code.

Community Development

- Support efforts to promote affordable housing solutions by providing legal services to BURA and the city's redevelopment efforts.
The office prepared transactional documents for BURA's acquisition of three properties: one along SW Beaverdam Road, one along SW Broadway St., and one along SW Farmington Rd. The office routinely advises BURA staff on its legal rights and responsibilities relating to Lot 2 at the Round, where the agency intends to construct a parking garage. The office also drafted documents to allow BURA to reimburse the city for its partial payment of system development charges on behalf of Canterbury Development in connection with the development of a hotel on the Westgate property. The office also advised BURA officials on the permitted uses of program income (i.e., funds received by BURA that are neither the proceeds of debt nor tax increment revenue). The office is in the process of drafting documents that would place covenants on real estate to promote affordability of rental housing on the property.

CITY OF BEAVERTON, OREGON
FISCAL YEAR 2019-20 BUDGET

FUND: 001 GENERAL	DEPARTMENT: CITY ATTORNEY
PROGRAM: 0581 GENERAL LEGAL SERVICES	DEPARTMENT HEAD: BILL KIRBY

- Support efforts to negotiate and enter into urban planning area agreements.
Upon request, the office provides legal advice to staff who are negotiating these agreements.

Finance

- Continue to diversify city revenue sources, especially non-property tax revenue streams, by working with the finance department to increase compliance with the city's business licenses ordinance by those who have businesses and have not paid their business license.
The office assisted the finance department in administering the city's business license ordinance. The office updated staff on the requirements of the ordinance and helped craft communications to delinquent accounts, encouraging them to comply with the ordinance so to avoid a ten percent delinquency charge and issuance of a civil infraction citation for failure to obtain the required license. Staff will evaluate the results of the compliance effort early in FY 2019/20.
- Assist in the implementation of new policies regarding regulatory licenses.
The office assisted the finance department and public works department in administering the city's utilities in the rights-of-way ordinance. The office updated staff on the requirements of the ordinance and helped craft communication encouraging affected utilities to comply with the ordinance so to avoid any legal proceeding to collect a required fee and to avoid the issuance of a civil infraction citation for failure to obtain any required registration or license. Staff will evaluate the results of the compliance effort early in FY 2019/20.
- Assist in the municipal court's transition from WINCS to Journal Technologies' e-suite document manage system.
The office continues to support installation of the new software system in the municipal court by assigning as staff member of the records management division to work on the project with ISD as a programmer analyst.

Police

- Provide requested legal services to finance and construct a new public safety building.
The office drafted the transactional documents used to purchase a half-acre parcel of land from Assembly of God Church, adjacent the public safety center. The office also has been actively negotiating for the acquisition of the Shell gas station at SW Hall and Allen Blvd. With help of this office, the city has obtained a DEQ-approved prospective purchaser agreement, which is a legally binding agreement between DEQ and the city that limits the city's liability to DEQ for environmental cleanup of the gas station property once the city owns the property. The office also advised the city regarding the terms and conditions of three grants awarded to the city in connection with the public safety building project. (One of the grants is a \$400,000 federal grant from the EPA to clean up brownfields on the public safety building site, another is a \$510,000 private grant from PGE to help pay for installing solar panels on the roof of the public safety building, and the third is a \$60,000 state grant from Business Oregon to help clean up the gas station site.)
- Continue to work with the police department's patrol division through officer trainings, attendance at briefings, as well as accessibility of the city attorney's office by phone and email.
In addition to routine legal issues trainings for police, this office provided extensive training on the enforcement of the city's new ordinance regulating camping in the public rights-of-way and, subsequently, on the impact a ruling of the Ninth Circuit Court of Appeals has on the city's enforcement of that ordinance.
- Provide legal review of police department's policy on body-worn cameras.
The office completed this goal and continues to assist the police department in implementing its body-worn camera program.
- Provide requested legal services select and contract with a photo red light/photo speed camera vendor.
The office drafted a request for proposals for photo red light camera enforcement services, assisted in the selection of a vendor to provide the requested services, then negotiated and drafted the contract relating to those services.
- Assist in the implementation of new photo speed program.
The office completed this goal and continues to assist the police department in implementing it's the city's new photo speed program.

Public Works

- Participate in the Willamette Water Group to establish agreements regarding the Willamette Water Supply System.
This office participated in the negotiation and implementation of two major intergovernmental agreements relating to the Willamette Water Supply System: The first agreement related to the collection of river water at the Willamette Intake Facility and created the Willamette Intake Facility Commission. The second agreement related to transmission of water in the Willamette Water Supply System and created the Willamette Water Supply System Commission.

CITY OF BEAVERTON, OREGON
FISCAL YEAR 2019-20 BUDGET

FUND: 001 GENERAL	DEPARTMENT: CITY ATTORNEY
PROGRAM: 0581 GENERAL LEGAL SERVICES	DEPARTMENT HEAD: BILL KIRBY

- Assist in the full implementation of Utility Facilities in Public Rights of Way ordinance; identify all utilities that use the rights of way and require utility licenses, business licenses and payment of applicable permit fees.
The office assisted the public works department and finance department in administering the city's utilities in the rights-of-way ordinance. The office updated staff on the requirements of the ordinance and helped craft communication encouraging affected utilities to comply with the ordinance so to avoid any legal proceeding to collect a required fee and to avoid the issuance of a civil infraction citation for failure to obtain any required registration or license. Staff will evaluate the results of the compliance effort early in FY 2019/20.
- Provide legal services as needed to design and construct the city's connection to the JWC north transmission line.
In FY 2018/19, the office provided substantial legal services in connection with a second round of withdrawals of service territory from the Tualatin Valley Water District. The increase in the city's water customer base and water demand resulting from the withdrawals supports the city's decision to connect the city's water system to the north transmission line. Until the withdrawal process is completed and customer accounts transferred to the city, the office expects there will be little demand for legal services in connection with the design and construction of the city's connection to the north transmission line.
- Review IGA with Clean Water Services to assure it is still appropriate for current circumstances.
The office has reviewed the original IGA and its amendments and summarized the terms of the current agreement with staff. If not renewed, the current IGA expires in June 2022.
- Provide legal services in connection with the implementation of a non-potable water irrigation system.
The office has provided services when requested.

Library

- Review and revise library policies as requested.
The office reviewed and recommended revisions to city policies regarding vending on library grounds.

Human Resources

- Continue to provide interim human resources director until a new director is hired.
An assistant city attorney of this office served as the city's interim human resources director full time for the first seven months of FY 2018/19. Her position within this office was not backfilled, but the city did use outside counsel when necessary to assist in the city's negotiation of two collective bargaining agreement and to advise the city on several time-consuming labor and employment matters.
- Assist in the implementation of Oregon's Equal Pay Act.
Partly because of a substantial delay in the publication of state administrative rules regarding this Equal Pay Act, work on this project was not started until the second half of FY 2018/19 and likely will not conclude until sometime in FY 2019/20.
- Provide legal services to complete the adoption and implementation of an ADA self-evaluation and transition plan.
The city has completed the self-evaluation of its programs, activities, and services and has a full draft of a transition plan of architectural and administrative barriers that need to be removed to make the city's programs accessible. This office expects council adoption of the transition plan to occur before the end of the current fiscal year. Implementation of the plan is an on-going duty of the city, and this office will assist in implementation of the plan as needed.

FY 2019-20 ACTION PLAN:

City Council

- Work with the human resources director to revise process for annual review by the city council of the city's two judges and the city attorney.

Mayor's Office

- Assist in city efforts to address homelessness in Beaverton, including providing legal advice regarding the city's pilot safe parking program.
- Support the implementation of a rental inspection program.
- Review and update the city's regulatory ordinances. These include ordinances related to parking, code infraction proceedings, licenses, water service, building codes, license revocation process, nuisance abatement procedures, and residential property maintenance.

CITY OF BEAVERTON, OREGON
FISCAL YEAR 2019-20 BUDGET

FUND: 001 GENERAL	DEPARTMENT: CITY ATTORNEY
PROGRAM: 0581 GENERAL LEGAL SERVICES	DEPARTMENT HEAD: BILL KIRBY

Community Development

- Support efforts to promote affordable housing solutions by providing legal services to BURA and the city's redevelopment efforts, including implementation of Metro bond.
- Assist in providing legal advice on parking as the city's parking manager develops the city's new parking management plan.
- Assist in providing legal advice around a pilot program to test how dockless bike share companies can operate in Beaverton.
- Support transportation technology planning and initial deployment, including small cells in the city's rights-of-way.
- Review the city's policies on system development charges and suggest any needed revisions.
- Review the city's policies on utility undergrounding and suggest any needed revisions.
- Assist in creation of a housing advisory committee, if approved by the city council.
- Review all legal instruments regularly used by the city's site development division and revise as needed.
- Assist in the department's procurement and implementation of an electronic document review process.
- Assist in construction of the Patricia Reser Center for the Arts and adjacent parking garage.

Finance

- Continue to diversify city revenue sources, especially non-property tax revenue streams, by working with the finance department to increase compliance with the city's business licenses ordinance and payment of required fees.
- Assist in the municipal court's build out of Journal Technologies' e-Court case management system.
- Assist in updating the Beaverton Purchasing Code to reflect changes been made to Oregon public contracting laws.
- With municipal court, continue to evaluate the feasibility of expanding the Beaverton Municipal Court's specialty court to include a behavioral health court or a community court.
- With municipal court, consider feasibility of expanding sentencing resources to attain restorative justice that focuses on the rehabilitation of offenders through reconciliation with victims and the community at large.

Police

- Provide requested legal services to construct a new public safety building.
- Complete acquisition of corner lot at SW Hall and Allen that abuts the public safety building
- Assist in implementing the new photo speed program.
- Provide ongoing, as-needed legal advice and counsel regarding street and public camping.
- Assist in implementing the new police records database system (PSNet) by drafting intergovernmental agreements so that other local governments may use or access the system.
- Assist in the transition from the old secondhand dealer program to the new secondhand dealer program based on changes made to the secondhand dealer ordinance.
- Streamline business processes for handling discovery requests relating to traffic citations.

Public Works

- Assist in the full implementation of Utility Facilities in Public Rights-of-Way ordinance: identify all utilities using the rights-of-way; require utilities to obtain appropriate licenses; and require payment of applicable permit fees.
- Provide legal services related to the design and construction of the city's connection to the JWC north transmission line.
- Review IGA with Clean Water Services to assure it is still appropriate for current circumstances.
- Provide legal services in connection with the implementation of a non-potable water irrigation system.
- Provide legal services to assist with the withdrawal of more than 460 properties from the TVWD.
- Provide legal services related to the Willamette Water Supply Project, including entering into an intergovernmental agreement with Hillsboro and TVWD.

Human Resources

- Assist in on-boarding of a new human resources director.

CITY OF BEAVERTON, OREGON
FISCAL YEAR 2019-20 BUDGET

FUND: 001 GENERAL	DEPARTMENT: CITY ATTORNEY
PROGRAM: 0581 GENERAL LEGAL SERVICES	DEPARTMENT HEAD: BILL KIRBY

- Assist in implementation of Oregon's Equal Pay Act.
- Assist in updating the city's Equal Employment Opportunity Plan.
- Provide legal services to complete the adoption and implementation of an ADA self-evaluation and transition plan.
- Assist in revising the city's policy regarding employee and volunteer background checks.
- Assist in updating the city's employee handbook.

COMMUNITY VISION:

Examples of Beaverton Community Vision action items that the legal services program helped the city accomplish in FY 2018-19 include:

- *Community Vision Action Item #5: Expand outreach to under-represented populations.* Provided legal advice on the application of the city's business inclusion and diversity policy to specific circumstances.
- *Community Vision Action Item #17: Enhance police and court facilities.* Provided public contracting and real estate acquisition services to assist the City in designing and constructing an earthquake-resilient public safety center.
- *Community Vision Action Item #18:* Support proactive criminal justice initiatives. Participated in city's award-winning B-SOBR program. The office also participated in evaluating the feasibility of a Beaverton-based behavioral health court.
- *Community Vision Action Item #34:* Adopt measures to reduce or prevent homelessness. Provided legal advice and counsel relating to homelessness.
- *Community Vision Action Item #48: Install safe sidewalks and pedestrian lighting citywide.* Provided legal advice on the requirements of the ADA relating to streets and sidewalks and the adoption of a transition plan to document the schedule by which the city will install ADA-compliant curb ramps.
- *Community Vision Action Item #62:* Create several unique districts. Provided legal services on several projects affecting the Beaverton Central District and Old Town.
- *Community vision Action Item #64* Implement a storefront improvement program. Provided legal services relating to the storefront improvement program.
- *Community Vision Action Item #67:* Redevelop blighted properties. Served as legal counsel for the city's redevelopment agency.
- *Community Vision Action Item #71:* Develop an arts and cultural center. Provided legal advice relating to the development of the Patricia Reser Center for the Arts.

PERFORMANCE MEASURES:

Cost of Service Per Hour:	FY 2016-17	FY 2017-18	FY 2018-19	FY 2019-20
	Actual	Actual	Budget	Proposed
Support Staff:	\$46.30	\$51.64	\$55.03	\$55.17
Attorney:	<u>85.46</u>	<u>79.57</u>	<u>97.78</u>	<u>101.44</u>
TOTAL	\$131.76	\$131.21	\$152.81	\$156.61

Outside Counsel: The office occasionally recommends the hiring of outside counsel to handle legal matters that are either beyond the work capacity of the office or involve specialized legal knowledge. During FY 2018/19, the office recommended the hiring of outside legal counsel to assist in labor and employment issues because the office's principal labor and employment lawyer was serving as the city's interim HR director. The office also recommended hiring outside legal counsel to assist in matters involving specialization in bankruptcy law, environmental law, eminent domain, and federal telecommunication law. The hourly rate for outside attorneys for FY 2018/19 ranges from \$225 to \$405 per hour. The weighted average rate is \$310 per hour.

Police Training: The city prosecutors regularly attend police department shift briefings and conduct a four-hour training on the legal system for all newly-hired police officers.

CITY OF BEAVERTON, OREGON
FISCAL YEAR 2019-20 BUDGET
CURRENT LEVEL OF SERVICES

FUND: 001 GENERAL	DEPARTMENT: CITY ATTORNEY
PROGRAM: 0533 RECORDS MANAGEMENT	PROGRAM MANAGER: DEBBIE BAIDENMANN

PROGRAM GOAL:

To provide responsive, high-quality, cost-effective records management services to the mayor, city council, city staff and all the city's departments, agencies, boards and commissions.

REQUIREMENTS	FY 2016-17 ACTUAL	FY 2017-18 ACTUAL	FY 2018-19 BUDGETED	FY 2019-20 PROPOSED	FY 2019-20 ADOPTED
POSITION	4.80	4.80	4.80	4.80	0.00
PERSONNEL SERVICES	\$419,227	\$453,542	\$484,065	\$553,690	\$0
MATERIALS & SERVICES	32,873	38,451	63,645	44,279	0
CAPITAL OUTLAY					
TRANSFERS	2,679	2,750	2,772	2,752	0
TOTAL	\$454,779	\$494,743	\$550,482	\$600,721	\$0

PROGRAM OBJECTIVES:

Administer a city-wide records and information management program, including:

- Training all city staff in appropriate management of public records and information and the use of the city's records management and archiving systems.
- Controlling and safeguarding the information assets of the city throughout the information lifecycle.
- Coordinating access to public records and information, whether in response to an internal request, a public records request, a subpoena or a request for discovery in connection with litigation.

PROGRESS ON FY 2018-19 ACTION PLAN:

Records Management (Archives)

- Continue to manage HPeRM content to reduce archive paper storage footprint in accordance with applicable city policies and administrative rules.
RM staff works with other city staff in developing new electronic workflows to reduce paper storage needs. For FY 2018-19, RM expects fewer than 40 new boxes of records will accession into archive storage, due to increasing citywide electronic workflow processes where staff produce and store documents in electronic format only.
- Continue to evaluate options to reduce the cost and improve the functionality of HPeRM records management software.
HPeRM use has been reevaluated with a result of limiting the number of full license users and implementing 'read only' licenses to most city staff that use HPeRM. Read only licenses are 50% less expensive than full licenses. It is anticipated this change will save the city approximately \$40,000 per year when implementation is complete in April 2019.
- Finish a five-year plan for records management division.
A draft strategic plan for management of the city's information has been prepared and will be finished by the end of FY 2019-20.
- Recommend a new fee schedule for public records to city council.
Due to work load demands the new fee schedule had been postponed in the previous FY. Staff currently use actual costs of responding to requests (generally staff time plus copy costs).
- Properly dispose of 200 boxes stored at the Griffith Drive Building and 500 boxes at Harvest Court, so that by 2020 no boxes of archived records need to be in stored at Harvest Court.
At the two locations combined, 227 boxes have been destroyed in the first six months of FY 2018-19. Another 250 boxes are expected to be disposed of in the second six months of the fiscal year. Additionally, RM staff audited the contents of approximately 45 boxes and consolidated their content into fewer boxes. RM staff expects that no boxes of archived records will be stored at Harvest Court after 2019.

Public Records Requests, Litigation, Discovery & Subpoenas

- Review and revise as needed Beaverton's public records request policy.
Continue to follow changes in public records law by Oregon State Legislature and respond to complex requests and timelines for public records with strict adherence to privacy guidelines.

CITY OF BEAVERTON, OREGON
FISCAL YEAR 2019-20 BUDGET
CURRENT LEVEL OF SERVICES

FUND: 001 GENERAL	DEPARTMENT: CITY ATTORNEY
PROGRAM: 0533 RECORDS MANAGEMENT	PROGRAM MANAGER: DEBBIE BAIDENMANN

- Evaluate and, if justified, purchase third-party public records request on-line system capable of processing payments for use by records management and police.
RM and BPD have reviewed one public record request on-line system in January 2019 and anticipate system demonstrations from two other companies in May 2019. ISD project initiation forms have been completed so ISD can utilize information to form a project management plan for a public records request system.

FY 2019-20 ACTION PLAN:

Records Management (Archives)

- Continue to manage HPeRM content to reduce archive paper storage footprint in accordance with applicable city policies and administrative rules.
- Continue to evaluate options to reduce the cost and improve the functionality of HPeRM records management software.
- Recommend a new fee schedule for public records to city council.
- For use as a performance measure, track of the volume of records put into HPeRM.
- Continue to relocate physical records stored at Harvest Court to Griffith Drive Building, thus eliminating the need for paper storage at Harvest Court by 2020.
- Recommend whether HPeRM's WebDrawer feature should be used to provide the public with access to Beaverton's records that have been deemed appropriate for unfiltered public access.
- Circulate the draft strategic plan for management of the city's information prepared in FY 2018/19 to key stakeholders in the city for their review and comment.

Public Records Requests, Litigation, Discovery & Subpoenas

- Review and revise as needed Beaverton's public records request policy following the 2019 legislative session.
- For use to assess the potential utility of WebDrawer, keep track of the number of public records requests received that seek agenda bills, ordinances, resolutions, permits, or meeting minutes.
- If acquired, implement and train on a public record request on-line system for public records request management.

PERFORMANCE MEASURES:

Performance Measures:	FY 2016-17 Actual	FY 2017-18 Actual	FY 2018-19 Projected/Revised	FY 2019-20 Proposed
Research and retrieval requests filled for citizens/staff (combined research + retrieval)	600	650	600	600
Number of cubic feet (boxes) destroyed per retention schedule	83,500*	250	500	500
Number of real estate documents recorded in county land records per year using Simplifile, electronic recording software	80	80	90	80

*The prior years reflect number of pages. Starting FY 2017-18, the measure changed to reflect cubic feet (boxes).

COMMUNITY VISION:

Examples of Beaverton Community Vision action items that the records management program accomplished in FY 2018/19:

- Community Vision Action Item #2:* Create a Beaverton brand and market identity. Provided historical Beaverton photographs to a local establishment for display in their restaurant.
- Community Vision Action Item #25:* Expand community involvement in schools. Provided information to a local author to help him capture the story of Beaverton for use in cultural education.

BUDGET PREPARATION WORKSHEET SUMMARY

FUND: 001 GENERAL FUND

DEPT: 50 CITY ATTORNEY'S OFFICE

OBJ	2017 - ACTUAL		2018 - ACTUAL		2019 BUDGETED		2019 YTD	2019	2020 - PROPOSED		2020 - RECOMD		2020 ADOPTED	
	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE	ACT AMT	EST AMT	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE

CLASS: 05 PERSONNEL SERVICES

020 CITY PROSECUTOR

	105,731	1.00	105,727	1.00	110,406	1.00	83,636	110,159	117,018	1.00	115,887	1.00		
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031 CITY ATTORNEY

	154,344	.85	162,310	.85	160,640	.85	123,053	160,257	164,155	.85	162,566	.85		
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056 RECORDS MANAGER

	77,906	.90	80,707	.90	85,893	.90	61,897	84,911	91,048	.90	90,160	.90		
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117 LEGAL SECRETARY

	63,341	1.00	64,533	1.00	66,141	1.00	51,327	66,053	68,834	1.00	63,178	1.00		
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174 RECORDS MANAGEMENT SPECIALIST

	64,825	1.00	66,570	1.00	67,516	1.00	55,563	74,088	77,302	1.00	77,302	1.00		
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182 LEGAL SERVICES MANAGER

	64,370	.85	67,352	.85	74,069	.85	53,007	71,094	79,800	.85	79,033	.85		
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186 PROGRAM COORDINATOR

											74,821	1.00		
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192 ASSISTANT CITY ATTORNEY 3

	200,319	1.85	230,815	1.85	250,148	1.85	189,908	253,126	258,187	1.85	255,699	1.85		
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196 ASSISTANT CITY ATTORNEY 2

			14,221	1.00	126,324	1.00	94,525	126,153	131,496	1.00	130,225	1.00		
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221 SUPPORT SPECIALIST 2

	269,885	5.40	295,834	5.40	312,237	5.40	224,807	294,299	267,357	4.40	200,975	3.40		
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235 ASSISTANT CITY ATTORNEY 1

	144,572	2.00	154,621	2.00	169,934	2.00	124,463	165,806	182,256	2.00	180,488	2.00		
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275 TEMPORARY EMPLOYEES

			18,658		1,380			5,336	21,396		21,396			
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276 YOUTH ENHANCEMENT WORKFORCE

	8,363		13,349		12,528		12,348	12,349	15,552		15,552			
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291 LEGAL OFFICE ASSISTANT

									53,554	1.00	51,534	1.00		
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299 PAYROLL TAXES AND FRINGES

431

BUDGET PREPARATION WORKSHEET SUMMARY

FUND: 001 GENERAL FUND

DEPT: 50 CITY ATTORNEY'S OFFICE

OBJ	2017 - ACTUAL		2018 - ACTUAL		2019 BUDGETED		2019 YTD	2019	2020 - PROPOSED		2020 - RECOMD		2020 ADOPTED	
	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE	ACT AMT	EST AMT	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE
	524,360		615,992		722,734		528,798	666,626	749,025		777,862			
TOTAL CLASS: 05 PERSONNEL SERVICES														
	1,678,016	14.85	1,890,689	15.85	2,159,950	15.85	1,603,332	2,090,257	2,276,980	15.85	2,296,678	15.85		
CLASS: 10 MATERIALS & SERVICES														
301 OFFICE EXPENSE														
	1,963		1,349		1,700		1,319	1,708	1,800		1,800			
307 MEMBERSHIP FEES														
	6,702		6,952		8,362		8,988	8,157	8,462		8,462			
308 PERIODICALS & SUBSCRIPTIONS														
	13,100		14,851		14,500		13,140	14,500	16,000		16,000			
316 ADVERTISING, RECORDING & FILING														
	4,000		3,893		7,220		4,500	7,220	7,000		7,000			
317 COMPUTER EQUIPMENT														
	614		2,452		1,280		728	552	890		660			
318 COMPUTER SOFTWARE														
	297		313		297				28,315		315			
321 TRAVEL, TRAINING & SUBSISTENCE														
	17,077		16,673		20,920		11,886	16,320	21,760		20,260			
328 MEALS & RELATED EXPENSE														
	1,102		1,566		1,650		646	1,450	1,950		1,650			
330 MILEAGE REIMBURSEMENT														
	16		111		300		119	300	300		300			
341 COMMUNICATIONS EXPENSE														
	1,510		1,671		2,400		1,456	1,700	3,000		3,000			
342 DATA COMMUNICATION EXPENSE														
	360													
406 BANK SERVICE FEES														

432

BUDGET PREPARATION WORKSHEET SUMMARY

FUND: 001 GENERAL FUND

DEPT: 50 CITY ATTORNEY'S OFFICE

OBJ	2017 - ACTUAL		2018 - ACTUAL		2019 BUDGETED		2019 YTD	2019	2020 - PROPOSED		2020 - RECOMD		2020 ADOPTED	
	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE	ACT AMT	EST AMT	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE
			469		600		320	600	600		600			
481	OTHER EXPENSES													
	288		384		700			700	700		700			
483	EXTERNAL LEGAL SERVICES EXP													
	16,757		10,477		36,000		32,384	36,000	20,000		20,000			
511	PROFESSIONAL SERVICES													
	24,100		18,130		42,000		27,546	40,000	26,128		26,128			
551	RENTS AND LEASES													
	7,637		8,535		9,428		9,496	9,496	5,714		5,714			
TOTAL CLASS: 10 MATERIALS & SERVICES														
	95,523		87,826		147,357		112,528	138,703	142,619		112,589			
433	CLASS: 25 TRANSFERS													
816	TRSFERS TO REPROGRAPHICS FUND													
	11,494		11,380		11,643		5,614	11,643	11,661		11,009			
TOTAL CLASS: 25 TRANSFERS														
	11,494		11,380		11,643		5,614	11,643	11,661		11,009			
TOTAL DEPARTMENT: 50 CITY ATTORNEY'S OFFICE														
	1,785,033	14.85	1,989,895	15.85	2,318,950	15.85	1,721,474	2,240,603	2,431,260	15.85	2,420,276	15.85		

**CITY ATTORNEY
FY 2018-19 ADOPTED**

Code	Position Title	Actual FY 17-18	Adopted FY 18-19	New	Transfer	Reclass	Deleted	Ending FY 18-19
20	CITY PROSECUTOR	1.00	1.00					1.00
31	CITY ATTORNEY	0.85	0.85					0.85
56	RECORDS MANAGER	0.90	0.90					0.90
117	LEGAL SECRETARY	1.00	1.00					1.00
174	RECORDS MANAGEMENT SPECIALIST	1.00	1.00					1.00
182	LEGAL SERVICES MANAGER	0.85	0.85					0.85
186	PROGRAM COORDINATOR	0.00	0.00					0.00
192	ASSISTANT CITY ATTORNEY 3	1.85	1.85					1.85
196	ASSISTANT CITY ATTORNEY 2	1.00	1.00					1.00
221	SUPPORT SPECIALIST 2	5.40	5.40					5.40
235	ASSISTANT CITY ATTORNEY 1	2.00	2.00					2.00
291	LEGAL OFFICE ASSISTANT	0.00	0.00					0.00
	Total	15.85	15.85	0.00	0.00	0.00	0.00	15.85

FY 2019-20 PROPOSED

Code	Position Title	Adopted FY 18-19	New	Transfer	Reclass	Deleted	Proposed FY 19-20
20	CITY PROSECUTOR	1.00					1.00
31	CITY ATTORNEY	0.85					0.85
56	RECORDS MANAGER	0.90					0.90
117	LEGAL SECRETARY	1.00					1.00
174	RECORDS MANAGEMENT SPECIALIST	1.00					1.00
182	LEGAL SERVICES MANAGER	0.85					0.85
186	PROGRAM COORDINATOR	0.00					0.00
192	ASSISTANT CITY ATTORNEY 3	1.85					1.85
196	ASSISTANT CITY ATTORNEY 2	1.00					1.00
221	SUPPORT SPECIALIST 2	5.40			(1.00) ^a		4.40
235	ASSISTANT CITY ATTORNEY 1	2.00					2.00
291	LEGAL OFFICE ASSISTANT	0.00			1.00 ^a		1.00
	Total	15.85	0.00	0.00	0.00	0.00	15.85

^a FY 2019-20 reclassifies a Support Specialist position to a Legal Office Assistant.

City of Beaverton - Finance
 Budget Preparation - 2020

BP WORKSHEET & JUSTIFICATION

FUND: 001 GENERAL FUND
 DEPT: 50 CITY ATTORNEY'S OFFICE
 PROGRAM: 0581 GENERAL LEGAL SERVICES

OBJ	2017 - ACTUAL		2018 - ACTUAL		2019 BUDGETED		2019	2020 - PROPOSED		2020 - RECOMD		2020 ADOPTED	
	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE	EST AMT	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE

CLASS: 05 PERSONNEL SERVICES

020	CITY PROSECUTOR	105,731	1.00	105,727	1.00	110,406	1.00	110,159	117,018	1.00	115,887	1.00	
031	CITY ATTORNEY	154,344	.85	162,310	.85	160,640	.85	160,257	164,155	.85	162,566	.85	
117	LEGAL SECRETARY	63,341	1.00	64,533	1.00	66,141	1.00	66,053	68,834	1.00	63,178	1.00	
182	LEGAL SERVICES MANAGER	64,370	.85	67,352	.85	74,069	.85	71,094	79,800	.85	79,033	.85	
186	PROGRAM COORDINATOR										74,821	1.00	
192	ASSISTANT CITY ATTORNEY 3	200,319	1.85	230,815	1.85	250,148	1.85	253,126	258,187	1.85	255,699	1.85	
196	ASSISTANT CITY ATTORNEY 2			14,221	1.00	126,324	1.00	126,153	131,496	1.00	130,225	1.00	
221	SUPPORT SPECIALIST 2	130,928	2.50	149,457	2.50	158,446	2.50	143,808	96,153	1.50	29,771	.50	
235	ASSISTANT CITY ATTORNEY 1	144,572	2.00	154,621	2.00	169,934	2.00	165,806	182,256	2.00	180,488	2.00	
275	TEMPORARY EMPLOYEES			18,658		1,380		5,336	21,396		21,396		
291	LEGAL OFFICE ASSISTANT								53,554	1.00	51,534	1.00	
299	PAYROLL TAXES AND FRINGES	395,184		469,453		558,397		502,441	551,497		578,390		

TOTAL CLASS: 05 PERSONNEL SERVICES

		1,258,789	10.05	1,437,147	11.05	1,675,885	11.05	1,604,233	1,724,346	11.05	1,742,988	11.05	
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CLASS: 10 MATERIALS & SERVICES

301	OFFICE EXPENSE	1,525		1,020		1,500		1,500	1,500		1,500		
307	MEMBERSHIP FEES	5,689		5,404		6,935		6,730	7,035		7,035		

BP WORKSHEET & JUSTIFICATION

FUND: 001 GENERAL FUND
 DEPT: 50 CITY ATTORNEY'S OFFICE
 PROGRAM: 0581 GENERAL LEGAL SERVICES

OBJ	OBJECT DESCRIPTION
	JUSTIFICATIONS

- 020 CITY PROSECUTOR
- 031 CITY ATTORNEY
 POSITION ALLOCATION: 15% INSURANCE FUND AND 85% GENERAL FUND
- 117 LEGAL SECRETARY
 FY 19-20 REFLECTS 1 FTE SS2 POSITION RECLASSSED TO LEGAL SECRETARY.
- 182 LEGAL SERVICES MANAGER
 POSITION ALLOCATION: 15% INSURANCE FUND AND 85% GENERAL FUND
- 186 PROGRAM COORDINATOR
- 192 ASSISTANT CITY ATTORNEY 3
 POSITION ALLOCATION FOR 1 FTE ASST. CA 3 POSITION: 15% INSURANCE FUND AND 85% GENERAL FUND
- 196 ASSISTANT CITY ATTORNEY 2
 FY 2017-18 REFLECTS A NEW 1 FTE ASSISTANT CITY ATTORNEY 2 POSITION.
 FY 2017-18 ALSO REFLECTS DECREASE DUE TO POSITION UN-FILLED FOR FIRST PART OF THE YEAR.
- 221 SUPPORT SPECIALIST 2
 FY 19-20 REFLECTS 1 FTE SUPPORT SPECIALIST 2 POSITION RECLASSIFIED TO
 LEGAL OFFICE ASSISTANT.
 FY 19-20 ALSO REFLECTS 1 FTE SS2 POSITION RECLASSSED TO LEGAL SECRETARY.
- 235 ASSISTANT CITY ATTORNEY 1
- 275 TEMPORARY EMPLOYEES
- 291 LEGAL OFFICE ASSISTANT
 FY 19-20 REFLECTS 1 FTE SUPPORT SPECIALIST 2 POSITION RECLASSIFIED TO
 LEGAL OFFICE ASSISTANT.
- 299 PAYROLL TAXES AND FRINGES
 PAYROLL TAXES AND FRINGE BENEFITS EXPRESSED AS A PERCENTAGE OF SALARY
 TOTALS 58.14% AS A CITY-WIDE AVERAGE AND CONSISTS OF THE FOLLOWING:
 34.14% IN PAYROLL TAXES CONSISTING OF 7.65% FICA, AVERAGE OF 23.22% FOR
 RETIREMENT CONTRIBUTIONS (28.45% PERS. 19.45% OPSRP GENERAL OR
 24.08% OPSRP POLICE), AND 3.27% IN OTHER TAXES (UNEMPLOYMENT,
 LONG TERM DISABILITY, WORKERS COMPENSATION, PEHP, AND TRIMET)
 24.00% AS THE AVERAGE COST OF MEDICAL, DENTAL, LIFE AND AD&D INSURANCES

- 301 OFFICE EXPENSE
 OFFICE SUPPLIES (PENS, FILES, FOLDERS, BINDERS)
- 307 MEMBERSHIP FEES
 (1) INTN. MUNICIPAL LAWYERS ASSOC. \$1,025
 (2) OREGON DISTRICT ATTORNEYS ASSOC. \$300
 (1) NATIONAL ASSOCIATION OF TELECOMMUNICATIONS OFFICERS & ADVISORS \$750
 (7) OREGON STATE BAR \$4,410
 (5) OREGON CITY ATTORNEY ASSOC. \$300
 (1) MULT. CO. BAR ASSOC. \$150
 (1) OREGON LABOR AND EMPLOYMENT RELATIONS ASSOC. \$100

City of Beaverton - Finance
 Budget Preparation - 2020

BP WORKSHEET & JUSTIFICATION

FUND: 001 GENERAL FUND
 DEPT: 50 CITY ATTORNEY'S OFFICE
 PROGRAM: 0581 GENERAL LEGAL SERVICES

OBJ	2017 - ACTUAL		2018 - ACTUAL		2019 BUDGETED		2019	2020 - PROPOSED		2020 - RECOMD		2020 ADOPTED	
	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE	EST AMT	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE
308	PERIODICALS & SUBSCRIPTIONS												
	13,100		14,851		14,500		14,500	16,000		16,000			
317	COMPUTER EQUIPMENT												
	614		2,452		1,280		552	890		660			
318	COMPUTER SOFTWARE												
	297		313		297			315		315			
321	TRAVEL, TRAINING & SUBSISTENCE												
	11,485		9,263		13,000		9,000	13,000		13,000			
328	MEALS & RELATED EXPENSE												
	914		1,364		1,200		1,000	1,500		1,200			
330	MILEAGE REIMBURSEMENT												
	16		111		300		300	300		300			
341	COMMUNICATIONS EXPENSE												
	1,510		1,671		2,400		1,700	3,000		3,000			
342	DATA COMMUNICATION EXPENSE												
	360												
406	BANK SERVICE FEES												
			469		600		600	600		600			
481	OTHER EXPENSES												
	288		384		700		700	700		700			
483	EXTERNAL LEGAL SERVICES EXP												
	16,757		10,477		36,000		36,000	20,000		20,000			
511	PROFESSIONAL SERVICES												
	10,095		1,596		5,000		3,000	4,000		4,000			
TOTAL CLASS: 10 MATERIALS & SERVICES													
	62,650		49,375		83,712		75,582	68,840		68,310			
CLASS: 25 TRANSFERS													
816	TRSFERS TO REPROGRAPHICS FUND												
	8,815		8,630		8,871		8,871	8,746		8,257			
TOTAL CLASS: 25 TRANSFERS													
	8,815		8,630		8,871		8,871	8,746		8,257			
TOTAL PROGRAM: 0581 GENERAL LEGAL SERVICES													
	1,330,254	10.05	1,495,152	11.05	1,768,468	11.05	1,688,686	1,801,932	11.05	1,819,555	11.05		
TOTAL DEPARTMENT: 50 CITY ATTORNEY'S OFFICE													

BP WORKSHEET & JUSTIFICATION

FUND: 001 GENERAL FUND
 DEPT: 50 CITY ATTORNEY'S OFFICE
 PROGRAM: 0581 GENERAL LEGAL SERVICES

OBJ	OBJECT DESCRIPTION
	JUSTIFICATIONS

308	PERIODICALS & SUBSCRIPTIONS COST OF MAINTAINING LAW LIBRARY (PUBLICATIONS, SUPPLEMENTS, ON-LINE LEGAL RESEARCH, SUBSCRIPTIONS, CLE'S) WESTLAW ONLINE LEGAL RESEARCH SUBSCRIPTION (\$1242 /MONTH - 9 USERS)
317	COMPUTER EQUIPMENT LAPTOP FOR PROSECUTOR \$660
318	COMPUTER SOFTWARE ADOBE ACROBAT PRO \$315
321	TRAVEL, TRAINING & SUBSISTENCE OREGON DISTRICT ATTORNEYS ASSOC. (1 PERSON) \$1,100 OREGON DISTRICT ATTORNEYS ASSOC. VICTIM ASSISTANCE DIRECTOR DAY \$500 INTERNATIONAL MUNICIPAL LAWYERS ASSOC. (1 PERSON) - OUT OF STATE \$2,000 OREGON CITY ATTORNEYS MUNICIPAL LAW CLE (5 PERSON) \$1,440 REAL ESTATE AND LAND USE SECTION (OSB) (1 PERSON) \$400 GOVERNMENT LAW SECTION (OSB) (2 PERSON) \$900 E-PROSECUTOR CONFERENCE (2 PERSON) - OUT OF STATE \$1,500 LEAGUE OF OREGON CITIES - ATTORNEY WORKSHOP (5 PERSON) \$500 CIS ANNUAL CONFERENCE (1 PERSON) \$300 DEPT HEAD RETREAT (1 PERSON) \$500 CONTINUING LEGAL EDUCATION (CLE'S) (7 PERSONS) \$1,250 NATIONAL ASSOC. OF TELECOMMUNICATIONS OFFICERS AND ADVISORS (1 PERSON) - OUT OF STATE \$2,610
328	MEALS & RELATED EXPENSE LOCAL TRAINING LUNCHEONS AND MEETINGS
330	MILEAGE REIMBURSEMENT PARKING EXPENSES AND LOCAL MILEAGE WHEN CITY CAR NOT AVAILABLE
341	COMMUNICATIONS EXPENSE CELL PHONE CHARGES FOR 5 STAFF (\$250 PER MONTH) \$3,000
342	DATA COMMUNICATION EXPENSE
406	BANK SERVICE FEES ONLINE DISCOVERY VENDOR FEES \$600
481	OTHER EXPENSES ORGANIZATIONAL DEVELOPMENT AND TEAM BUILDING EXPENSE (17.50 FTES X \$40 EA)
483	EXTERNAL LEGAL SERVICES EXP FUNDING FOR EXPERT ATTORNEY/PARALEGAL SERVICES TO SUPPLEMENT IN-HOUSE STAFF ON SPECIAL PROJECTS/LITIGATION SUPPORT (LABOR)
511	PROFESSIONAL SERVICES SERVICES TO ASSIST WITH LEGAL PROJECTS/LITIGATION EXPENSES (TITLE REPORTS, DEPOSITION COSTS, DMV RECORDS, SERVICE OF SUBPOENAS, LANGUAGE LINE, CONF CALLS, 2018 CITY CODE UPDATES)
816	TRSFERS TO REPROGRAPHICS FUND ALLOCATION OF COPIER, GRAPHICS, PRINTING, MAILING, & POSTAGE CHARGES THROUGH REPROGRAPHICS \$8,257

City of Beaverton - Finance
 Budget Preparation - 2020

BP WORKSHEET & JUSTIFICATION

FUND: 001 GENERAL FUND
 DEPT: 50 CITY ATTORNEY'S OFFICE
 PROGRAM: 0533 OFFICE SERVICES & RECORDS MGMT

OBJ	2017 - ACTUAL		2018 - ACTUAL		2019 BUDGETED		2019	2020 - PROPOSED		2020 - RECOMD		2020 ADOPTED	
	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE	EST AMT	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE

CLASS: 05 PERSONNEL SERVICES

056	RECORDS MANAGER												
	77,906	.90	80,707	.90	85,893	.90	84,911	91,048	.90	90,160	.90		
174	RECORDS MANAGEMENT SPECIALIST												
	64,825	1.00	66,570	1.00	67,516	1.00	74,088	77,302	1.00	77,302	1.00		
221	SUPPORT SPECIALIST 2												
	138,957	2.90	146,377	2.90	153,791	2.90	150,491	171,204	2.90	171,204	2.90		
276	YOUTH ENHANCEMENT WORKFORCE												
	8,363		13,349		12,528		12,349	15,552		15,552			
299	PAYROLL TAXES AND FRINGES												
	129,176		146,539		164,337		164,185	197,528		199,472			

TOTAL CLASS: 05 PERSONNEL SERVICES

	419,227	4.80	453,542	4.80	484,065	4.80	486,024	552,634	4.80	553,690	4.80		
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CLASS: 10 MATERIALS & SERVICES

301	OFFICE EXPENSE												
	438		329		200		208	300		300			
307	MEMBERSHIP FEES												
	1,013		1,548		1,427		1,427	1,427		1,427			
316	ADVERTISING, RECORDING & FILING												
	4,000		3,893		7,220		7,220	7,000		7,000			
318	COMPUTER SOFTWARE									28,000			
321	TRAVEL, TRAINING & SUBSISTENCE												
	5,592		7,410		7,920		7,320	8,760		7,260			
328	MEALS & RELATED EXPENSE												
	188		202		450		450	450		450			
511	PROFESSIONAL SERVICES												
	14,005		16,534		37,000		37,000	22,128		22,128			

BP WORKSHEET & JUSTIFICATION

FUND: 001 GENERAL FUND
 DEPT: 50 CITY ATTORNEY'S OFFICE
 PROGRAM: 0533 OFFICE SERVICES & RECORDS MGMT

OBJ	OBJECT DESCRIPTION
	JUSTIFICATIONS

- 056 RECORDS MANAGER
 POSITION ALLOCATION: 10% INSURANCE FUND AND 90% GENERAL FUND
- 174 RECORDS MANAGEMENT SPECIALIST
- 221 SUPPORT SPECIALIST 2
 1 FTE IS ALLOCATED 10% INSURANCE FUND & 90% GENERAL FUND.
- 276 YOUTH ENHANCEMENT WORKFORCE
 TWO STUDENTS IN SUMMER AT 480 HRS/EA (960 HOURS) AND SPRING BREAK AT 40 HRS/EA (80 HOURS) TO HELP REGULAR STAFF WITH DESTRUCTION, MOVING BOXES PLUS PREPPING AND SCANNING CITY DOCUMENTS.
- 299 PAYROLL TAXES AND FRINGES
 PAYROLL TAXES AND FRINGE BENEFITS EXPRESSED AS A PERCENTAGE OF SALARY TOTALS 58.14% AS A CITY-WIDE AVERAGE AND CONSISTS OF THE FOLLOWING:
 34.14% IN PAYROLL TAXES CONSISTING OF 7.65% FICA, AVERAGE OF 23.22% FOR RETIREMENT CONTRIBUTIONS (28.45% PERS. 19.45% OPSRP GENERAL OR 24.08% OPSRP POLICE), AND 3.27% IN OTHER TAXES (UNEMPLOYMENT, LONG TERM DISABILITY, WORKERS COMPENSATION, PEHP, AND TRIMET)
 24.00% AS THE AVERAGE COST OF MEDICAL, DENTAL, LIFE AND AD&D INSURANCES
- 301 OFFICE EXPENSE
 OFFICE SUPPLIES \$300
- 307 MEMBERSHIP FEES
 ASSOC RECORDS MGRS & ADMIN (ARMA) (3)
 CERTIFIED RECORDS MANAGER FEE (CRM) 1
 ASSOC FOR INTELLIGENT INFORMATION MGMT (AIIM) (3)
 OREGON ASSOC MUNICIPAL RECORDERS (OAMR) (1)
 NATIONAL ASSOC GOVERNMENT ARCHIVES & RECORDS ADM (NAGARA) (1)
- 316 ADVERTISING, RECORDING & FILING
 DOCUMENT RECORDING OF EASEMENTS, DEEDS, DEDICATIONS, AGREEMENTS AND ORDINANCES \$7,000
 E-RECORDING VIA THE INTERNET THROUGH SIMPLIFILE. RECORDING FEES INCREASED JUNE 2018 BY \$40 PER DOCUMENT
- 318 COMPUTER SOFTWARE
- 321 TRAVEL, TRAINING & SUBSISTENCE
 ASSOC RECORDS MGRS (ARMA) INTL CONF (NEW ORLEANS) (OCT. 2019) 2 STAFF @ \$2500 EA \$5,000
 ASSOC FOR INTELLIGENT INFORMATION MGMT (AIIM) INTL CONF (ORLANDO) (MARCH 2020) 1 STAFF \$1,500
 ARMA CHAPTER MEETING 8 MTGS @ \$20 PER MTG \$160
 CERTIFIED RECORDS MANAGER CERTIFICATION (CRM) \$600 (STAFF DID NOT CERTIFY IN FY18/19, BUT WILL TAKE CERTIFICATION IN FY19/20 \$600)
- 328 MEALS & RELATED EXPENSE
 REFRESHMENTS FOR TRIM REGIONAL USERS GROUP (RUG) MEETINGS (6 PER YEAR @ \$75 PER MEETING) \$450
- 511 PROFESSIONAL SERVICES
 VENDOR CONVERSION OF MICROFILM TO DIGITAL IMAGES - YEAR 4 OF A 5-YEAR PROJECT. \$10,000
 PROFESSIONAL SHREDDING (RELAY RESOURCES). \$2,128
 OUTSOURCE SCANNING OF PAPER RECORDS IN PREPARATON OF VACATING AND ELIMINATING HARVEST COURT OFFSITE STORAGE COSTS BY YEAR 2020.
 SCAN REMAINING AND/OR MAINTENANCE RECORDS TO BE STORED AT GRIFFITH BLDG/BEAVERTON BLDG \$10,000

City of Beaverton - Finance
 Budget Preparation - 2020

BP WORKSHEET & JUSTIFICATION

FUND: 001 GENERAL FUND
 DEPT: 50 CITY ATTORNEY'S OFFICE
 PROGRAM: 0533 OFFICE SERVICES & RECORDS MGMT

OBJ	2017 - ACTUAL		2018 - ACTUAL		2019 BUDGETED		2019	2020 - PROPOSED		2020 - RECOMD		2020 ADOPTED	
	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE	EST AMT	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE
551	RENTS AND LEASES												
	7,637		8,535		9,428		9,496	5,714		5,714			
TOTAL CLASS: 10 MATERIALS & SERVICES													
	32,873		38,451		63,645		63,121	73,779		44,279			
CLASS: 25 TRANSFERS													
816	TRSFERS TO REPROGRAPHICS FUND												
	2,679		2,750		2,772		2,772	2,915		2,752			
TOTAL CLASS: 25 TRANSFERS													
	2,679		2,750		2,772		2,772	2,915		2,752			
TOTAL PROGRAM: 0533 OFFICE SERVICES & RECORDS MGMT													
	454,779	4.80	494,743	4.80	550,482	4.80	551,917	629,328	4.80	600,721	4.80		

BP WORKSHEET & JUSTIFICATION

FUND: 001 GENERAL FUND
DEPT: 50 CITY ATTORNEY'S OFFICE
PROGRAM: 0533 OFFICE SERVICES & RECORDS MGMT

OBJ	OBJECT DESCRIPTION
	JUSTIFICATIONS

- 551 RENTS AND LEASES
RENT EXPENSE FOR OFFSITE FACILITY (HARVEST COURT) FOR STORAGE OF PAPER RECORDS \$5,714
RECORDS MGMT WILL NEED OFFSITE SPACE AT HARVEST COURT THROUGH DECEMBER 2019 ONLY.
PAPER RECORDS WILL BE DESTROYED, SCANNED OR MOVED TO GRIFFITH DRIVE LOCATION,
ELIMINATING THE NEED FOR OFFSITE STORAGE AT HARVEST COURT BY 12/2019.

- 816 TRSFERS TO REPROGRAPHICS FUND
ALLOCATION OF COPIER, GRAPHICS, PRINTING, MAILING & POSTAGE CHARGES THROUGH REPROGRAPHICS \$2,752

BP WORKSHEET & JUSTIFICATION

OBJ	2017 - ACTUAL		2018 - ACTUAL		2019 BUDGETED		2019	2020 - PROPOSED		2020 - RECOMD		2020 ADOPTED	
	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE	EST AMT	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE
	1,785,033	14.85	1,989,895	15.85	2,318,950	15.85	2,240,603	2,431,260	15.85	2,420,276	15.85		

BP WORKSHEET & JUSTIFICATION

OBJ	OBJECT DESCRIPTION
	JUSTIFICATIONS

ESTIMATE - PAYROLL EXPENSE BY DEPARTMENT

Thursday, April 18, 2019 4:17 PM

ACCOUNT	TITLE	FTE	REG HRS	OT HRS	HIL HRS	REG PAY	OT PAY	HIL PAY	ADD PAY	SALARY	FBAMT	TOT AMT
001-50	CITY ATTORNEY'S OFFICE											
001-50-0533-05-056	RECORDS MANAGER	0.90	1,926			84,914				84,911	37,365	122,276
001-50-0533-05-174	RECORDS MANAGEMENT	1.00	2,080			74,088				74,088	35,129	109,217
001-50-0533-05-221	SUPPORT SPECIALIST 2	2.90	5,813			150,490				150,491	90,629	241,120
001-50-0533-05-276	YOUTH ENHANCEMENT WORKFORCE		916			12,349				12,349	1,062	13,411
	OFFICE SERVICES & RECORDS	4.80	10,735			321,841				321,839	164,185	486,024
001-50-0581-05-020	CITY PROSECUTOR	1.00	2,160			110,159				110,159	69,787	179,946
001-50-0581-05-031	CITY ATTORNEY	0.85	1,904			160,256				160,257	68,607	228,864
001-50-0581-05-117	LEGAL SECRETARY	1.00	2,162			66,053				66,053	47,768	113,821
001-50-0581-05-182	LEGAL SERVICES MANAGER	0.85	1,768			71,094				71,094	45,899	116,993
001-50-0581-05-192	ASSISTANT CITY ATTORNEY 3	1.85	3,875			253,127				253,126	96,539	349,665
446 001-50-0581-05-196	ASSISTANT CITY ATTORNEY 2	1.00	2,082			126,153				126,153	53,854	180,007
001-50-0581-05-221	SUPPORT SPECIALIST 2	2.50	5,291			138,398			5,410	143,808	50,742	194,550
001-50-0581-05-235	ASSISTANT CITY ATTORNEY 1	2.00	4,154			165,806				165,806	68,797	234,603
001-50-0581-05-275	TEMPORARY EMPLOYEES		116			5,336				5,336	448	5,784
	GENERAL LEGAL SERVICES	11.05	23,512			1,096,383			5,410	1,101,792	502,441	1,604,233
	**** DEPARTMENT TOTAL ****	15.85	34,247			1,418,224			5,410	1,423,631	666,626	2,090,257

PROPOSE - PAYROLL EXPENSE BY DEPARTMENT

Thursday, April 18, 2019 4:17 PM

ACCOUNT	TITLE	FTE	REG HRS	OT HRS	HIL HRS	REG PAY	OT PAY	HIL PAY	ADD PAY	SALARY	FBAMT	TOT AMT
001-50	CITY ATTORNEY'S OFFICE											
001-50-0533-05-056	RECORDS MANAGER	0.90	1,996			90,160				90,160	44,604	134,764
001-50-0533-05-174	RECORDS MANAGEMENT	1.00	2,096			77,302				77,302	40,265	117,567
001-50-0533-05-221	SUPPORT SPECIALIST 2	2.90	6,188			171,204				171,204	113,559	284,763
001-50-0533-05-276	YOUTH ENHANCEMENT WORKFORCE		1,152			15,552				15,552	1,044	16,596
	OFFICE SERVICES & RECORDS	4.80	11,432			354,218				354,218	199,472	553,690
001-50-0581-05-020	CITY PROSECUTOR	1.00	2,216			115,887				115,887	77,814	193,701
001-50-0581-05-031	CITY ATTORNEY	0.85	1,883			162,566				162,566	80,276	242,842
001-50-0581-05-117	LEGAL SECRETARY	1.00	2,096			59,578			3,600	63,178	19,296	82,474
001-50-0581-05-182	LEGAL SERVICES MANAGER	0.85	1,883			79,033				79,033	54,196	133,229
001-50-0581-05-186	PROGRAM COORDINATOR	1.00	2,176			74,821				74,821	55,790	130,611
001-50-0581-05-192	ASSISTANT CITY ATTORNEY 3	1.85	3,911			255,699				255,699	110,304	366,003
001-50-0581-05-196	ASSISTANT CITY ATTORNEY 2	1.00	2,096			130,225				130,225	61,687	191,912
001-50-0581-05-221	SUPPORT SPECIALIST 2	0.50	1,048			27,971			1,800	29,771	9,150	38,921
001-50-0581-05-235	ASSISTANT CITY ATTORNEY 1	2.00	4,192			180,488				180,488	83,442	263,930
001-50-0581-05-275	TEMPORARY EMPLOYEES		745			21,396				21,396	1,429	22,825
001-50-0581-05-291	LEGAL OFFICE ASSISTANT	1.00	2,096			51,534				51,534	25,006	76,540
	GENERAL LEGAL SERVICES	11.05	24,342			1,159,198			5,400	1,164,598	578,390	1,742,988
	**** DEPARTMENT TOTAL ****	15.85	35,774			1,513,416			5,400	1,518,816	777,862	2,296,678

447

Insurance Fund
(Gen. Liab & Workers Comp)

CITY OF BEAVERTON, OREGON
FISCAL YEAR 2019-20 BUDGET
CURRENT LEVEL OF SERVICES

FUND: 706 INSURANCE AGENCY FUND	DEPARTMENTS: CITY ATTORNEY
	DEPARTMENT HEAD: BILL KIRBY

MISSION STATEMENT:

Provide high-quality, cost-effective risk management services by making the organization safer and more resilient and safeguarding city resources from the adverse impact of loss. (*Council Goals #2: Use city resources efficiently to ensure long-term financial stability; #4: Provide responsive, cost-effective service to the community; #5: Assure a safe and healthy community; #8: Provide and support a highly-qualified and motivated city work force.*)

Services and Trends:

Services

The Insurance Agency Fund supports the city’s risk management program, which operates under the auspices of the city attorney’s office. The risk management program identifies, analyzes, evaluates and reduces the impact of risk on the city by managing and administering (1) the city’s safety and loss-control program and (2) its insurance coverages. The risk management program assists in safeguarding the city from the adverse impact of loss by purchasing insurance, responding to and resolving claims and developing programs, plans and procedures to make the organization safer and more resilient. By reducing the frequency and severity of injuries and claims, the risk management program helps reduce the financial impact those events can have on the city.

1. Safety and loss control. The city’s safety and loss control program assists city departments by consulting on safety and occupational health concerns. The risk management program surveys operations, evaluates exposures and the effectiveness of loss controls and offers suggestions where necessary. Safety training, education and motivation point the way to a safer, more productive work place.

2. Insurance coverages. The city self-insures against its workers’ compensation risks and has auto, property, general liability and cyber liability coverage through CIS and other insurers. The risk management program oversees all aspects of the city employee work-related injury program, including working with the third-party administrator for claims management and workers' compensation defense litigation. The risk management program receives, analyzes, and tracks all claims for auto, property or general liability claim asserted against the city. The city utilizes the services of CIS to investigate the claims, determine liability and resolve claims either through negotiation or litigation. Where appropriate, the risk management program pursues recovery of incurred losses caused by third parties.

Trends

The city’s risk management program became part of the city attorney’s office in July 2015. In October 2015, with the help of the finance department, we recommended to council that Brown and Brown Northwest (BBNW) become the city’s new insurance broker. A top priority for the risk management program is for BBNW to assist us in assessing the strengths and weaknesses of our existing risk management program and identifying opportunities and challenges for improvement. We will keep policymakers informed about the major findings and recommendations of the assessment.

BUDGET HIGHLIGHTS:

The insurance agency fund’s FY 2019-20 budget is a status quo budget, intended to provide the same insurance coverages and level of risk management services as in FY 2018-19. Some deductibles were increased where it appears to make risk management and economic sense. Insurance rates will increase compared to last year; percentage increase projections for insurance rates for FY 2019-20 are as follows:

- General Liability – 10% increase;
- Auto Liability – 10% increase
- Property – 15% increase
- Storage tank, Crime and Flood – 10% increase;
- Difference in Coverage – 15% increase;
- Workers’ Compensation Excess Policy –10% increase.
- Cyber Liability - 10% increase.

CITY OF BEAVERTON, OREGON
FISCAL YEAR 2019-20 BUDGET
CURRENT LEVEL OF SERVICES

FUND: 706 INSURANCE AGENCY FUND	DEPARTMENT: CITY ATTORNEY
PROGRAM: 0010 GENERAL LIABILITY	DEPARTMENT HEAD: BILL KIRBY

PROGRAM GOAL:

To minimize exposure to auto, property and general liability losses.

REQUIREMENTS	FY 2016-17 ACTUAL	FY 2017-18 ACTUAL	FY 2018-19 BUDGETED	FY 2019-20 PROPOSED	FY 2019-20 ADOPTED
POSITION	0.80	0.80	0.80	0.80	0.00
PERSONNEL SERVICES	\$115,885	\$124,309	\$131,641	\$139,973	\$0
MATERIALS & SERVICES	1,214,932	960,389	1,089,677	1,202,055	0
CAPITAL OUTLAY					
TRANSFERS	38,061	40,838	44,846	45,458	0
CONTINGENCY	0	0	86,182	295,726	0
RESERVE	0	0	1,500,000	1,500,000	0
TOTAL	\$1,368,878	\$1,125,536	\$2,852,346	\$3,183,212	\$0

Progress on FY 2018-19 Action Plan:

- Identify property claims for subrogation for 2018-19.
Risk management collected \$241,453 in no fault property claims from Jan. 1, 2018 to Dec. 31, 2018. This amount includes reimbursement from CIS for liability claims that we handled in-house.
- Continue to educate and train all departments on claims and the city's exposure to loss. A special emphasis will remain with public works and the police department.
On-going review of losses with management, loss analysis completed and reviewed at safety meetings. The number of property and liability claims were like the previous year.
- Continue to research the benefits of becoming fully self-insured.
Our recommendation for FY 2019-20, is to keep the city's auto and general liability insurance in place and to continue to evaluate options to reduce the cost of insurance without assuming unreasonable risk.
- Ensure we provided the recommended data on the Agility recovery website in case of a catastrophic loss.
Work in progress. The COOP plan has been downloaded into Agility's website.
- Reinstated the Risk Management Committee and meet at least 2 times a year to discuss the Risk Management Program.
Meetings have occurred and will continue. Several department heads receive monthly updates regarding our liability and WC claims.
- Update city's risk management program policy, Resolution 3470 (1998)
Work in progress that is expected to be completed this fiscal year.

FY 2019-20 Action Plan:

- Identify property claims for subrogation for 2019-20.
- Continue to educate and train all departments on claims and the city's exposure to loss. A special emphasis will remain with public works and the police department.
- Continue to research the benefits of becoming fully self-insured.

CITY OF BEAVERTON, OREGON
FISCAL YEAR 2019-20 BUDGET
CURRENT LEVEL OF SERVICES

FUND: 706 INSURANCE AGENCY FUND	DEPARTMENT: CITY ATTORNEY
PROGRAM: 0010 GENERAL LIABILITY	DEPARTMENT HEAD: BILL KIRBY

PERFORMANCE MEASURES & DISCUSSION:

Property and Liability Claims:	FY 2016-17 Actual	FY 2017-18 Actual	FY 2018-19 Budgeted/Revised	FY 2019-20 Proposed
Number of general liability claims filed	42	30	40 / 56	40
Average allocated cost per liability claim	\$8,053	\$5,859	\$4,000	\$6,000
Number of city property damage claims received	103	83	80 / 88	90
Claims Paid:	FY 2016-17 Actual	FY 2017-18 Actual	FY 2018-19 Budgeted/Revised	FY 2019-20 Proposed
Damaged city property	\$173,108	\$117,188	\$125,000 / \$160,000	\$150,000
Liability claims	\$338,225	\$174,846	\$160,000 / \$200,000	\$175,000
3 rd Party property damage	\$1,150	\$907	\$2,000	\$2,000

The actual number of 2017-18 liability claims totaled 30 (an average of 2.5 claims per month). This is fewer claims than we had in 2016-17. The average amount paid for the 30 claims (\$5,859) this was less than the originally projected average amount (\$8,272). As a result, the amount paid out for all liability claims in 2017-18 (\$175,753) was less than originally budgeted. We did receive reimbursement from CIS on one significant claim.

FY 2018-19 is trending to be a higher than normal year as to the number of reported claims: around 56 claims (an average of 4.7 claims per month). The average cost per claim has decreased so far in 2018-19. As of the end of December 2018, we had 28 new liability claims and 19 open liability claims with a payout of \$111,305 or \$3,975 per claim. If the trend continues, we anticipate the amount paid out for all liability claims in 2018-19 will be about \$200,000. This is still a bit high, but similar to what we paid in 2017-18. We have received notice of a tort claim arising out of a police pursuit in which a bystander was injured and is seeking \$2M in damages against the city and the person the police were pursuing. The city denies liability for the plaintiff's injuries caused by the person being pursued. The Oregon Tort Claims Act would limit our financial exposure of the city to a maximum of approximately \$1M if the city is found liable for plaintiff's personal injuries and property damages.

The number of 2017-18 property claims decreased from 103 claims to 83 (an average of 6.9 claims per month). Over half of the claims (46) were property claims that were a result of an at fault claimant. The amount paid out for all property claims decreased, from \$173,108 to \$117,188. That is \$1,412 per property claim in 2017-18.

For 2018-19, city property claims are higher for the first six months compared to 2017-18. We are averaging 7.3 claims per month with a total payout of \$83,722 or \$1,903 per claim.

Many of the city property damage claims are a result of accidents not caused by the city (2017-18 had 46 and 2018-19 has 23 so far). The city can recover money through subrogation for these sorts of accidents involving no fault of the city. This continues to be helpful in offsetting the paid claims that were the city's fault. In 2017-18 we collected \$78,422 through subrogation and \$349,486 in insurance company reimbursements through CIS. For 2018-19 we have collected \$26,391 through December. That represents a recovery rate of 67% of all property claims in 2017-18 and 32% for the first half of 2018-19.

CITY OF BEAVERTON, OREGON
FISCAL YEAR 2019-20 BUDGET
CURRENT LEVEL OF SERVICES

FUND: 706 INSURANCE AGENCY FUND	DEPARTMENT: CITY ATTORNEY
PROGRAM: 0014 WORKERS' COMPENSATION	PROGRAM MANAGER: BRIAN STROHL

Program Goal: To minimize the exposure to workers' compensation losses by administering and coordinating occupational health programs that adhere to laws, rules and regulations and ensure a safe and healthy work force.

REQUIREMENTS	FY 2016-17 ACTUAL	FY 2017-18 ACTUAL	FY 2018-19 BUDGETED	FY 2019-20 PROPOSED	FY 2019-20 ADOPTED
POSITION	0.85	0.85	0.85	0.85	0.00
PERSONNEL SERVICES	\$118,539	\$122,969	\$130,049	\$138,764	\$0
MATERIALS & SERVICES	347,911	497,097	413,050	355,930	0
CAPITAL OUTLAY					
TRANSFERS	28,863	29,460	31,802	32,045	0
CONTINGENCY	0	0	152,781	139,918	0
RESERVE	0	0	500,000	600,000	0
TOTAL	\$495,313	\$649,526	\$1,227,682	\$1,266,657	\$0

Services

- Oversee all aspects of the city employee work-related injury program, including working with the third-party administrator for claims management and workers' compensation defense litigation.
- Ensure city-wide development, implementation and maintenance of safety and health programs to control and minimize hazards that could result in injury or illness to its workforce.
- Evaluate work environments, in conjunction with city departments, to review potential safety and health problems with departmental operations, procedures and facilities.
- Minimize potential risks for the city, and improve safety for the city and its residents.
- Assess and reduce public risks or liabilities associated with city programs, services and events.

Progress on FY 2018-19 Action Plan:

- Continue to work with the public works department and continue the ongoing training with police (defensive tactics, bike training, range, etc.) in an effort to reduce our claims count.
In-field time with public works and police increased during the first half of the fiscal year. The goal remains for the second half of the fiscal year to get out regularly and participate in their activities and trainings.
- Continue to provide necessary documentation for TRISTAR for collection through Employee at Injury Program (EAIP) and the necessary reports for the OSHA 300 Log.
Extensive work has been done in an effort to collect on EAIP. TRISTAR uses a third party vendor responsible for the collection of the EAIP which has created additional work for Risk Management, but is very fruitful. Thus far from January 1, 2018 to December 31, 2018 we collected \$16,130 through EAIP. As of December 2017, we were required to electronically submit our OSHA 300A information to OSHA. 2018 has been filed and posted.
- Hold quarterly meetings with TRISTAR to discuss problem claims and trends.
This has been done on a regular basis and other meetings/discussions take place regularly to address questionable and problem claims. Monthly reports and quarterly claim summaries are provided as well as face to face meetings.
- Work with the Public Works Department to make sure all required training is completed and that the Safety Manual is being reviewed and updated. Follow-up on how Succeed is working out for public works safety training.
About 75% of the Safety Manual has been reviewed/updated. Annual trainings are being completed and Succeed is being used regularly at Public Works as well with other departments.

FY 2019-20 Action Plan:

- Continue to work with the public works department and continue the ongoing training with police (defensive tactics, bike training, range, etc.) in an effort to reduce our claims count.
- Continue to provide necessary documentation for TRISTAR for collection through EAIP and the necessary reports for the OSHA 300 Log.
- Hold quarterly meetings with TRISTAR to discuss problem claims and trends.

CITY OF BEAVERTON, OREGON
 FISCAL YEAR 2019-20 BUDGET
 CURRENT LEVEL OF SERVICES

FUND: 706 INSURANCE AGENCY FUND	DEPARTMENT: CITY ATTORNEY
PROGRAM: 0014 WORKERS' COMPENSATION	PROGRAM MANAGER: BRIAN STROHL

- Work with the Public Works Department to make sure all required training is completed and that the Safety Manual is being reviewed and updated. Follow-up on how Succeed is working out for public works safety training.
- Increased involvement with Public Works Managers Meeting and General Facilities Safety Meeting

Performance Measures & Discussion:

Workers' Compensation Claims Data:	FY 2016-17	FY 2017-18	FY 2018-19	FY 2019-20
	Actual	Actual	Budgeted/Revised	Proposed
Workers' compensation claims filed	28	25	28 / 25	25
Value of paid workers compensation claims	\$147,689	\$306,634	\$200,000 / \$150,000	\$150,000
Lost workdays	114	1	100	100
Experience rating modifier: Target = <1.0	.86	.88	.88 / .86	.86

The city's work related injuries for FY 2017-18 decreased from the previous year. In 2017-18, we paid ~\$12,265/claim and averaged 2.1 claims/month. In 2018-19 thus far, we are averaging \$4,418/claim and we are getting 1.7 claims/month. This amount is much lower than FY 2017-18 and more typical to what we normally see. We currently have 2 claims that require legal attention (these are the files that make our payout numbers spike). Keep in mind that the payment of claims also includes claims reported in previous years, so the true amount paid per claim is not very accurate.

On-going safety training for the employees is done on a regular basis and they are constantly made aware of our policies and what is required of them to help alleviate injuries on the job. Ergonomic evaluations continue to be done and will continue into the next fiscal year. Several variations of stand-up desk units have been purchased over the last fiscal year.

The city continues to pay for time loss through salary continuation. This procedure helps keep things simple for the injured employee as well as for payroll administration. TRISTAR assists in obtaining necessary documentation for risk management's required reports (OSHA 300). They also are very good about collecting on EAIP claims and on workers' compensation restitution. For 2017-18 we collected \$19,164 through EAIP. This is lower than last FY due to injuries requiring less light duty days.

Our experience rating modifier has decreased from .88 to .86. An experience rating modifier below 1.0 reflects that our claim payout and claim severity history is better than most of our comparable entities. We are hopeful that we will continue to see a reduction in our modifier in the next few years and hopefully get below .80.

City of Beaverton - Finance
 Budget Preparation - 2020

BP WORKSHEET & JUSTIFICATION

FUND: 706 INSURANCE AGENCY FUND
 DEPT: 03 REVENUE
 PROGRAM: 0010 GEN LIAB & COMP INS COVERAGE

OBJ	2017 - ACTUAL		2018 - ACTUAL		2019 BUDGETED		2019	2020 - PROPOSED		2020 - RECOMD		2020 ADOPTED	
	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE	EST AMT	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE

CLASS: 05 BEGINNING WORKING CAPITAL

301	BEGINNING WORKING CAPITAL												
	1,375,018		1,366,362		1,538,305		1,538,305	1,546,713		1,546,713			

TOTAL CLASS: 05 BEGINNING WORKING CAPITAL

	1,375,018		1,366,362		1,538,305		1,538,305	1,546,713		1,546,713			
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CLASS: 35 MISCELLANEOUS REVENUES

384	INVESTMENT INTEREST EARNINGS												
	11,815		17,168		19,100		23,000	26,700		26,700			

386	3RD PARTY SUBROGATION												
	25,438		15,829		35,000		35,000	35,000		35,000			

399	REIMBURSEMENTS - OTHER												
	227,373		4,450				14,669						

757 MED/LIFE INS PREM REFUND DISTRIBUTION
 94

TOTAL CLASS: 35 MISCELLANEOUS REVENUES

	264,626		37,541		54,100		72,669	61,700		61,700			
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CLASS: 40 INTERFUND TRANSFERS/LOANS

411	TRSFERS FROM GENERAL FUND												
	357,723		411,381		411,381		411,381	514,226		514,226			

412	TRSFERS FROM STREET FUND												
	132,834		152,760		152,760		152,760	199,452		199,452			

419	TRSFERS FROM WATER FUND												
	198,941		228,792		228,792		228,792	285,990		285,990			

421	TRSFERS FROM SEWER FUND												
	143,163		164,637		164,637		164,637	205,671		205,671			

424	TRSFERS FROM REPROGRAPHICS FUND												
	5,323		6,121		6,121		6,121	7,651		7,651			

425	TRSFERS FROM GARAGE FUND												
	40,868		46,998		46,998		46,998	58,747		58,747			

426	TRSFERS FROM ISD												
	5,761		6,625		6,625		6,625	8,281		8,281			

430	TRANSFER FROM LIBRARY FUND												
	97,019		111,572		111,572		111,572	139,465		139,465			

440	TRSFERS FR STREET LIGHTING FUND												
	5,915		6,802		6,802		6,802						

441	TRSFERS FR STORM DRAIN FUND												
	108,046		124,253		124,253		124,253	155,316		155,316			

BP WORKSHEET & JUSTIFICATION

FUND: 706 INSURANCE AGENCY FUND
 DEPT: 03 REVENUE
 PROGRAM: 0010 GEN LIAB & COMP INS COVERAGE

OBJ	OBJECT DESCRIPTION
	JUSTIFICATIONS

301 BEGINNING WORKING CAPITAL

384 INVESTMENT INTEREST EARNINGS
 INTEREST EARNINGS IS BASED ON AVAILABLE CASH BALANCES AND INTEREST RATES:
 FY 16-17 BUDGETED INTEREST EARNINGS ARE BASED UPON .55%
 FY 17-18 BUDGETED INTEREST EARNINGS ARE BASED UPON 1.10%
 FY 18-19 BUDGETED INTEREST EARNINGS ARE BASED UPON 1.75% FY 19-20 BUDGETED INTEREST EARNINGS ARE BASED
 UPON 3.00% \$26,700

386 3RD PARTY SUBROGATION
 REVENUES FROM SUBGROGATING CLAIMS TO 3RD PARTIES \$35,000

399 REIMBURSEMENTS - OTHER
 FY 2016-17 REFLECTS:
 INSURANCE REIMBURSEMENT EQUIPMENT DAMAGED IN BEAVERTON BUILDING WATER DAMAGE \$19,425
 INSURANCE REIMBURSEMENT VACTOR TRUCK DAMAGE \$52,800

757 MED/LIFE INS PREM REFUND DISTRIBUTION
 MODA MEDICAL INSURANCE PREMIUM EXPERIENCE REBATE DISTRIBUTION TO OPERATING FUNDS

411 TRSFERS FROM GENERAL FUND
 ALLOCATION OF CHARGES FOR GENERAL LIABILITY AND PROPERTY INSURANCE TO ALL FUNDS \$514,226

412 TRSFERS FROM STREET FUND

419 TRSFERS FROM WATER FUND

421 TRSFERS FROM SEWER FUND

424 TRSFERS FROM REPROGRAPHICS FUND

425 TRSFERS FROM GARAGE FUND

426 TRSFERS FROM ISD

430 TRANSFER FROM LIBRARY FUND

440 TRSFERS FR STREET LIGHTING FUND

441 TRSFERS FR STORM DRAIN FUND

BP WORKSHEET & JUSTIFICATION

FUND: 706 INSURANCE AGENCY FUND
 DEPT: 03 REVENUE
 PROGRAM: 0010 GEN LIAB & COMP INS COVERAGE

OBJ	2017 - ACTUAL		2018 - ACTUAL		2019 BUDGETED		2019	2020 - PROPOSED		2020 - RECOMD		2020 ADOPTED	
	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE	EST AMT	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE

TOTAL CLASS: 40 INTERFUND TRANSFERS/LOANS

	1,095,593		1,259,941		1,259,941		1,259,941	1,574,799				1,574,799	
TOTAL PROGRAM: 0010 GEN LIAB & COMP INS COVERAGE	2,735,237		2,663,844		2,852,346		2,870,915	3,183,212				3,183,212	

City of Beaverton - Finance
Budget Preparation - 2020

BP WORKSHEET & JUSTIFICATION

FUND: 706 INSURANCE AGENCY FUND
DEPT: 03 REVENUE
PROGRAM: 0010 GEN LIAB & COMP INS COVERAGE

OBJ	OBJECT DESCRIPTION
	JUSTIFICATIONS

City of Beaverton - Finance
 Budget Preparation - 2020

BP WORKSHEET & JUSTIFICATION

FUND: 706 INSURANCE AGENCY FUND
 DEPT: 40 INSURANCE DIVISION
 PROGRAM: 0010 GEN LIAB & COMP INS COVERAGE

OBJ	2017 - ACTUAL		2018 - ACTUAL		2019 BUDGETED		2019	2020 - PROPOSED		2020 - RECOMD		2020 ADOPTED	
	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE	EST AMT	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE

CLASS: 05 PERSONNEL SERVICES

030	RISK & SAFETY OFFICER												
	35,408	.40	34,613	.40	35,432	.40	36,012	37,556	.40	37,193	.40		
031	CITY ATTORNEY												
	18,158	.10	19,096	.10	18,897	.10	18,855	19,312	.10	19,126	.10		
056	RECORDS MANAGER												
	4,328	.05	4,485	.05	4,775	.05	4,719	5,058	.05	5,012	.05		
182	LEGAL SERVICES MANAGER												
	7,573	.10	7,924	.10	8,715	.10	8,364	9,392	.10	9,301	.10		
192	ASSISTANT CITY ATTORNEY 3												
	8,592	.10	11,901	.10	13,494	.10	14,179	14,102	.10	13,965	.10		
221	SUPPORT SPECIALIST 2												
	2,654	.05	2,732	.05	2,796	.05	2,882	3,020	.05	3,020	.05		
299	PAYROLL TAXES AND FRINGES												
	39,172		43,558		47,532		45,745	50,197		52,356			

TOTAL CLASS: 05 PERSONNEL SERVICES

	115,885	.80	124,309	.80	131,641	.80	130,756	138,637	.80	139,973	.80		
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CLASS: 10 MATERIALS & SERVICES

303	OFFICE FURNITURE & EQUIPMENT												
	6,400		11,208		10,000		10,000	10,000		10,000			
305	SPECIAL DEPARTMENT SUPPLIES												
	3,864		3,130		5,000		5,000	5,000		5,000			
307	MEMBERSHIP FEES												
	820		820		900		900	900		900			
321	TRAVEL, TRAINING & SUBSISTENCE												
			692		1,000		1,000	1,500		1,500			
328	MEALS & RELATED EXPENSE												
	38				100		100	100		100			
330	MILEAGE REIMBURSEMENT												
	73		97		100		100	150		150			

BP WORKSHEET & JUSTIFICATION

FUND: 706 INSURANCE AGENCY FUND
 DEPT: 40 INSURANCE DIVISION
 PROGRAM: 0010 GEN LIAB & COMP INS COVERAGE

OBJ	OBJECT DESCRIPTION
	JUSTIFICATIONS

- 030 RISK & SAFETY OFFICER

- 031 CITY ATTORNEY
 POSITION ALLOCATION: TO 85% GENERAL FUND AND 15% INSURANCE FUND
 (10% GENERAL LIABILITY / 5% WORKERS COMP)

- 056 RECORDS MANAGER
 POSITION ALLOCATION: 90% GENERAL FUND AND 10% INSURANCE FUND
 (5% GENERAL LIABILITY / 5% WORKERS COMP)

- 182 LEGAL SERVICES MANAGER
 POSITION ALLOCATION: 85% GENERAL FUND AND 15% INSURANCE FUND
 (10% GENERAL LIABILITY / 5% WORKERS COMP)

- 192 ASSISTANT CITY ATTORNEY 3
 POSITION ALLOCATION: 85% GENERAL FUND AND 15% INSURANCE FUND
 (10% GENERAL LIABILITY / 5% WORKERS COMP)

- 221 SUPPORT SPECIALIST 2
 POSITION ALLOCATION: 90% GENERAL FUND AND 10% INSURANCE FUND
 (5% GENERAL LIABILITY / 5% WORKERS COMP)

- 299 PAYROLL TAXES AND FRINGES
 PAYROLL TAXES AND FRINGE BENEFITS EXPRESSED AS A PERCENTAGE OF SALARY
 TOTALS 58.14% AS A CITY-WIDE AVERAGE AND CONSISTS OF THE FOLLOWING:
 34.14% IN PAYROLL TAXES CONSISTING OF 7.65% FICA, AVERAGE OF 23.22% FOR
 RETIREMENT CONTRIBUTIONS (28.45% PERS. 19.45% OPSRP GENERAL OR
 24.08% OPSRP POLICE), AND 3.27% IN OTHER TAXES (UNEMPLOYMENT,
 LONG TERM DISABILITY, WORKERS COMPENSATION, PEHP, AND TRIMET)
 24.00% AS THE AVERAGE COST OF MEDICAL, DENTAL, LIFE AND AD&D INSURANCES

- 303 OFFICE FURNITURE & EQUIPMENT
 ERGONOMIC EQUIPMENT: TRAYS, KEYBOARDS, CHAIRS, MONITOR ARMS AND DESKS (STAND UP UNITS) \$7,000
 ADA ACCOMMODATIONS (EE) \$3,000

- 305 SPECIAL DEPARTMENT SUPPLIES
 AED SUPPLIES (BATTERIES, REPLACEMENT PADS), FIRST AID SUPPLIES \$5,000

- 307 MEMBERSHIP FEES
 RISK AND INSURANCE MANAGEMENT SOCIETY (RIMS) \$700
 SOCIETY (PRIMA) OREGON CHAPTER \$200

- 321 TRAVEL, TRAINING & SUBSISTENCE
 PUBLIC RISK MGT ASSOC REGIONAL CONFERENCE \$350
 OSHA CONFERENCE \$200
 CIS CONFERENCE \$200
 LODGING \$500
 MISC CONF EXPENSE/ARM CLASS \$250

- 328 MEALS & RELATED EXPENSE
 LUNCH AND DINNER BUSINESS MEETINGS \$100

- 330 MILEAGE REIMBURSEMENT
 MILEAGE REIMBURSEMENT FOR EMPLOYEE USE OF PERSONAL VEHICLE \$150

City of Beaverton - Finance
 Budget Preparation - 2020

BP WORKSHEET & JUSTIFICATION

FUND: 706 INSURANCE AGENCY FUND
 DEPT: 40 INSURANCE DIVISION
 PROGRAM: 0010 GEN LIAB & COMP INS COVERAGE

OBJ	2017 - ACTUAL		2018 - ACTUAL		2019 BUDGETED		2019	2020 - PROPOSED		2020 - RECOMD		2020 ADOPTED	
	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE	EST AMT	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE
387	GENERAL LIABILITY INSURANCE												
	442,705		446,494		551,077		550,000	589,205		604,705			
388	PROPERTY INSURANCE												
	155,601		152,194		175,000		160,000	192,050		192,050			
390	PUBLIC EMPLOYEES BOND												
	500		500		500		500	500		500			
457	BVTN BLDG FLOOD DAMAGE EXPENSE												
	30,705												
462	ADA COMPLIANCE EXPENSE												
					3,000		3,000	3,000		3,000			
511	PROFESSIONAL SERVICES												
	62,893		52,313		56,000		56,000	57,150		57,150			
520	CITY PROPERTY DAMAGE CLAIMS												
	173,108		117,188		125,000		160,000	150,000		150,000			
521	THIRD PARTY LIABILITY CLAIMS												
	337,075		174,846		160,000		200,000	175,000		175,000			
527	THIRD PARTY PROPERTY CLAIMS												
	1,150		907		2,000		2,000	2,000		2,000			
TOTAL CLASS: 10 MATERIALS & SERVICES													
	1,214,932		960,389		1,089,677		1,148,600	1,186,555		1,202,055			
CLASS: 25 TRANSFERS													
801	TRSFR TO GENERAL FD - OVERHEAD												
	17,408		17,181		18,663		18,663	19,206		19,206			
802	TRSFR TO GENERAL FD-ACCOUNTING												
	10,947		11,842		12,229		12,229	12,521		12,521			
816	TRSFRS TO REPROGRAPHICS FUND												
	525		452		832		832	583		550			
818	TRSFRS TO ISD-ALLOCATED												
	9,181		11,363		13,122		13,122	13,665		13,181			
TOTAL CLASS: 25 TRANSFERS													
	38,061		40,838		44,846		44,846	45,975		45,458			
CLASS: 30 FUND BAL/CONTINGENCY/RESERVES													
991	CONTINGENCY - UNRESERVED												
					86,182			312,045		295,726			
998	RESERVE												
					1,500,000			1,500,000		1,500,000			

BP WORKSHEET & JUSTIFICATION

FUND: 706 INSURANCE AGENCY FUND
 DEPT: 40 INSURANCE DIVISION
 PROGRAM: 0010 GEN LIAB & COMP INS COVERAGE

OBJ	OBJECT DESCRIPTION	JUSTIFICATIONS
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- 387 GENERAL LIABILITY INSURANCE
 - GENERAL LIABILITY (10% INCREASE) \$490,725
 - AUTO LIABILITY (10%) \$93,365
 - THREE TANKS AT PUBLIC WORKS GARAGE (10%) \$1,650
 - EXCESS CRIME (10%) \$3,465
 - CYBER LIABILITY (10%) \$15,500
- 388 PROPERTY INSURANCE
 - PROPERTY INSURANCE INCLUDING \$50M QUAKE AND FLOOD (15%) APPRAISED VALUE INCREASED BY 35M \$86,615
 - AUTO PHYSICAL DAMAGE (10%) \$12,850
 - NATIONAL FLOOD INSURANCE - 1 LOCATION (10%) \$4,185
 - PROPERTY INSURANCE EXCESS EARTHQUAKE (DIC) (15%) \$88,400
- 390 PUBLIC EMPLOYEES BOND
 - PUBLIC EMPLOYEE BLANKET BOND \$100
 - DEQ BONDS (4 X \$100) \$400
- 457 BVTN BLDG FLOOD DAMAGE EXPENSE
- 462 ADA COMPLIANCE EXPENSE
 - MINOR ADA BUILDING/ACCESS IMPROVEMENTS AS NECESSARY \$3,000
- 511 PROFESSIONAL SERVICES
 - DMV (\$750) AND BACKGROUND CHECKS (\$10/PERSON X 125) \$2,000
 - AGENT OF RECORD FEES (3% INCREASE) \$55,150
- 520 CITY PROPERTY DAMAGE CLAIMS
 - ESTIMATED PROPERTY CLAIMS LOSSES AND DAMAGES TO CITY OWNED PROPERTY \$150,000
 - SUBROGATION NOT INCLUDED IN AMOUNT PROPOSED
- 521 THIRD PARTY LIABILITY CLAIMS
 - ESTIMATED LOSSES DUE TO LIABILITY CLAIMS AGAINST THE CITY \$175,000
 - (\$160,000 ANNUAL AGGREGATE DEDUCTIBLE)
- 527 THIRD PARTY PROPERTY CLAIMS
 - ESTIMATED LOSSES DUE TO THIRD PARTY PROPERTY CLAIMS AGAINST THE CITY \$2,000
 - (LOST PROPERTY, FENCE REPAIRS, ETC.)

- 801 TRSFR TO GENERAL FD - OVERHEAD
 - ALLOCATION OF OVERHEAD SERVICES PROVIDED BY THE GENERAL FUND \$19,206
- 802 TRSFR TO GENERAL FD-ACCOUNTING
 - ALLOCATION OF ACCOUNTING SERVICES PROVIDED BY THE GENERAL FUND \$12,521
- 816 TRSFERS TO REPROGRAPHICS FUND
 - ALLOCATION OF COPIER, GRAPHICS, PRINTING, MAILING, & POSTAGE CHARGES THROUGH REPROGRAPHICS \$550
- 818 TRSFERS TO ISD-ALLOCATED
 - ALLOCATION OF SERVICES PROVIDED BY THE INFORMATION SYSTEMS FUND \$13,181

- 991 CONTINGENCY - UNRESERVED
- 998 RESERVE
 - RESERVE FOR CATASTROPHIC LOSS \$1,500,000

City of Beaverton - Finance
 Budget Preparation - 2020

BP WORKSHEET & JUSTIFICATION

FUND: 706 INSURANCE AGENCY FUND
 DEPT: 40 INSURANCE DIVISION
 PROGRAM: 0010 GEN LIAB & COMP INS COVERAGE

OBJ	2017 - ACTUAL		2018 - ACTUAL		2019 BUDGETED		2019	2020 - PROPOSED		2020 - RECOMD		2020 ADOPTED	
	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE	EST AMT	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE

TOTAL CLASS: 30 FUND BAL/CONTINGENCY/RESERVES

					1,586,182			1,812,045		1,795,726			
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TOTAL PROGRAM: 0010 GEN LIAB & COMP INS COVERAGE

	1,368,878	.80	1,125,536	.80	2,852,346	.80	1,324,202	3,183,212	.80	3,183,212	.80		
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City of Beaverton - Finance
Budget Preparation - 2020

BP WORKSHEET & JUSTIFICATION

FUND: 706 INSURANCE AGENCY FUND
DEPT: 40 INSURANCE DIVISION
PROGRAM: 0010 GEN LIAB & COMP INS COVERAGE

OBJ	OBJECT DESCRIPTION
	JUSTIFICATIONS

City of Beaverton - Finance
 Budget Preparation - 2020

BP WORKSHEET & JUSTIFICATION

FUND: 706 INSURANCE AGENCY FUND
 DEPT: 03 REVENUE
 PROGRAM: 0014 SELF-INS WORKERS COMP INS

OBJ	2017 - ACTUAL		2018 - ACTUAL		2019 BUDGETED		2019	2020 - PROPOSED		2020 - RECOMD		2020 ADOPTED	
	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE	EST AMT	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE

CLASS: 05 BEGINNING WORKING CAPITAL

301	BEGINNING WORKING CAPITAL												
		732,347	794,183		726,082		726,082	726,328		730,257			

TOTAL CLASS: 05 BEGINNING WORKING CAPITAL

		732,347	794,183		726,082		726,082	726,328		730,257			
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CLASS: 35 MISCELLANEOUS REVENUES

384	INVESTMENT INTEREST EARNINGS												
		7,309	9,810		11,600		11,600	16,400		16,400			

399	REIMBURSEMENTS - OTHER												
		43,857	20,530				9,000						

757	MED/LIFE INS PREM REFUND DISTRIBUTION												
			94										

TOTAL CLASS: 35 MISCELLANEOUS REVENUES

		51,166	30,434		11,600		20,600	16,400		16,400			
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CLASS: 40 INTERFUND TRANSFERS/LOANS

421	TRSFERS FROM SEWER FUND												
			77,400										

TOTAL CLASS: 40 INTERFUND TRANSFERS/LOANS

			77,400										
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CLASS: 45 NON-REVENUE RECEIPTS

464	SELF-INS. WORKERS COMP - CITY												
		505,985	473,592		490,000		490,000	520,000		520,000			

TOTAL CLASS: 45 NON-REVENUE RECEIPTS

		505,985	473,592		490,000		490,000	520,000		520,000			
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TOTAL PROGRAM: 0014 SELF-INS WORKERS COMP INS

		1,289,498	1,375,609		1,227,682		1,236,682	1,262,728		1,266,657			
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OBJ	OBJECT DESCRIPTION	JUSTIFICATIONS
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301 BEGINNING WORKING CAPITAL

384 INVESTMENT INTEREST EARNINGS

INTEREST EARNINGS IS BASED ON AVAILABLE CASH BALANCES AND INTEREST RATES:
 FY 16-17 BUDGETED INTEREST EARNINGS ARE BASED UPON .55%
 FY 17-18 BUDGETED INTEREST EARNINGS ARE BASED UPON 1.10%
 FY 18-19 BUDGETED INTEREST EARNINGS ARE BASED UPON 1.75% FY 19-20 BUDGETED INTEREST EARNINGS ARE BASED UPON 3.00% \$16,400

399 REIMBURSEMENTS - OTHER

REIMBURSEMENT FROM STATE OF OREGON EMPLOYEE AT WORK INJURY PROGRAM

757 MED/LIFE INS PREM REFUND DISTRIBUTION

MODA MEDICAL INSURANCE PREMIUM EXPERIENCE REBATE DISTRIBUTION TO OPERATING FUNDS

421 TRSFERS FROM SEWER FUND

FY 2017-18 REFLECTS FUNDING OF A WORKERS COMPENSATION CLAIM SETTLEMENT DIRECTLY LIABLE TO THE SEWER FUND.

464 SELF-INS. WORKERS COMP - CITY

CHARGES PER EMPLOYEE FOR WORKERS COMPENSATION COSTS PROCESSED THROUGH THE PAYROLL SYSTEM. MAINTAIN A \$500,000 RESERVE TO COVER THE MAXIMUM EXPOSURE ON A SEVERE INJURY CASE

- FY 2008-09 EXPERIENCE MODIFIER 1.20
- FY 2009-10 EXPERIENCE MODIFIER 1.10
- FY 2010-11 EXPERIENCE MODIFIER 1.10
- FY 2011-12 EXPERIENCE MODIFIER 1.00
- FY 2012-13 EXPERIENCE MODIFIER 0.80
- FY 2013-14 EXPERIENCE MODIFIER 0.60
- FY 2014-15 EXPERIENCE MODIFIER 0.60
- FY 2015-16 EXPERIENCE MODIFIER 0.60
- FY 2016-17 EXPERIENCE MODIFIER 1.00
- FY 2017-18 EXPERIENCE MODIFIER 1.00
- FY 2018-19 EXPERIENCE MODIFIER 1.00
- FY 2019-20 EXPERIENCE MODIFIER 1.00 \$520,000

City of Beaverton - Finance
 Budget Preparation - 2020

BP WORKSHEET & JUSTIFICATION

FUND: 706 INSURANCE AGENCY FUND
 DEPT: 40 INSURANCE DIVISION
 PROGRAM: 0014 SELF-INS WORKERS COMP INS

OBJ	2017 - ACTUAL		2018 - ACTUAL		2019 BUDGETED		2019	2020 - PROPOSED		2020 - RECOMD		2020 ADOPTED	
	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE	EST AMT	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE

CLASS: 05 PERSONNEL SERVICES

030	RISK & SAFETY OFFICER												
	53,112	.60	51,919	.60	53,152	.60	54,010	56,332	.60	55,791	.60		
031	CITY ATTORNEY												
	9,080	.05	9,547	.05	9,449	.05	9,425	9,656	.05	9,565	.05		
056	RECORDS MANAGER												
	4,328	.05	4,482	.05	4,775	.05	4,719	5,058	.05	5,012	.05		
182	LEGAL SERVICES MANAGER												
	3,786	.05	3,961	.05	4,357	.05	4,182	4,696	.05	4,650	.05		
192	ASSISTANT CITY ATTORNEY 3												
	4,296	.05	5,949	.05	6,747	.05	7,092	7,048	.05	6,979	.05		
221	SUPPORT SPECIALIST 2												
	2,651	.05	2,732	.05	2,796	.05	2,882	3,020	.05	3,020	.05		
299	PAYROLL TAXES AND FRINGES												
	41,286		44,379		48,773		47,096	51,655		53,747			

TOTAL CLASS: 05 PERSONNEL SERVICES

	118,539	.85	122,969	.85	130,049	.85	129,406	137,465	.85	138,764	.85		
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CLASS: 10 MATERIALS & SERVICES

321	TRAVEL, TRAINING & SUBSISTENCE												
	43				250		250	250		250			
326	CITYWIDE TRAINING												
	8,083		8,360		11,000		11,000	11,000		11,000			
328	MEALS & RELATED EXPENSE												
	36		97		100		100	100		100			
330	MILEAGE REIMBURSEMENT												
	50		75		100		100	150		150			
389	W/C EXCESS INSURANCE COVERAGE												
	117,925		108,870		119,800		103,352	113,680		113,680			
393	WORKERS COMP STATE ASSESSMENT												
	23,933		35,444		25,000		25,000	25,000		25,000			
395	PERFORMANCE BOND INSURANCE												
	6,618		3,915		4,300		3,915	4,000		4,000			
461	SPECIAL EXPENSE												
	472		436		2,500		1,500	2,500		1,500			

OBJ	OBJECT DESCRIPTION
	JUSTIFICATIONS

030	RISK & SAFETY OFFICER
031	CITY ATTORNEY POSITION ALLOCATION: 85% GENERAL FUND AND 15% INSURANCE FUND (10% GENERAL LIABILITY / 5% WORKERS COMP)
056	RECORDS MANAGER POSITION ALLOCATION: 90% GENERAL FUND AND 10% INSURANCE FUND (5% GENERAL LIABILITY / 5% WORKERS COMP)
182	LEGAL SERVICES MANAGER POSITION ALLOCATION: 85% GENERAL FUND AND 15% INSURANCE FUND (10% GENERAL LIABILITY / 5% WORKERS COMP)
192	ASSISTANT CITY ATTORNEY 3 POSITION ALLOCATION: 85% GENERAL FUND AND 15% INSURANCE FUND (10% GENERAL LIABILITY / 5% WORKERS COMP)
221	SUPPORT SPECIALIST 2 POSITION ALLOCATION: 90% GENERAL FUND AND 10% INSURANCE FUND (5% GENERAL LIABILITY / 5% WORKERS COMP)
299	PAYROLL TAXES AND FRINGES PAYROLL TAXES AND FRINGE BENEFITS EXPRESSED AS A PERCENTAGE OF SALARY TOTALS 58.14% AS A CITY-WIDE AVERAGE AND CONSISTS OF THE FOLLOWING: 34.14% IN PAYROLL TAXES CONSISTING OF 7.65% FICA, AVERAGE OF 23.22% FOR RETIREMENT CONTRIBUTIONS (28.45% PERS. 19.45% OPSRP GENERAL OR 24.08% OPSRP POLICE), AND 3.27% IN OTHER TAXES (UNEMPLOYMENT, LONG TERM DISABILITY, WORKERS COMPENSATION, PEHP, AND TRIMET) 24.00% AS THE AVERAGE COST OF MEDICAL, DENTAL, LIFE AND AD&D INSURANCES
321	TRAVEL, TRAINING & SUBSISTENCE MISC TRAVEL \$250
326	CITYWIDE TRAINING PUBLIC WORKS - ALL OSHA REQUIRED COURSES: DEFENSIVE DRIVING, CONFINED SPACE, FORKLIFT, \$8,000 BLOODBORNE PATHOGEN, COMPETENT PERSON, LOCKOUT/TAGOUT, FALL PROTECTION, ETC AED, CPR, 1ST AID \$3,000
328	MEALS & RELATED EXPENSE SAFETY COMMITTEE LUNCHES AND BROWN BAGS \$100
330	MILEAGE REIMBURSEMENT MILEAGE REIMBURSEMENT FOR EMPLOYEE USE OF PERSONAL VEHICLE (WC HEARINGS AND CONFERENCES) \$150
389	W/C EXCESS INSURANCE COVERAGE WORKERS COMPENSATION EXCESS INSURANCE (\$650K RETENTION) - 10% INCREASE \$113,680
393	WORKERS COMP STATE ASSESSMENT STATE COMPENSATION ASSESSMENT; INCLUDES EMPLOYEES AND VOLUNTEERS. \$25,000 OUR EXPERIENCE RATING IS NOW AT .86
395	PERFORMANCE BOND INSURANCE WORKERS COMPENSATION SELF-INSURANCE SURETY BOND. \$4,000 BOND AMOUNT LOWERED TO \$300,000
461	SPECIAL EXPENSE SAFETY INCENTIVE PROGRAM AT PUBLIC WORKS, 2018 NEW PROGRAM \$1,500

City of Beaverton - Finance
 Budget Preparation - 2020

BP WORKSHEET & JUSTIFICATION

FUND: 706 INSURANCE AGENCY FUND
 DEPT: 40 INSURANCE DIVISION
 PROGRAM: 0014 SELF-INS WORKERS COMP INS

OBJ	2017 - ACTUAL		2018 - ACTUAL		2019 BUDGETED		2019	2020 - PROPOSED		2020 - RECOMD		2020 ADOPTED	
	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE	EST AMT	AMOUNT	FTE	AMOUNT	FTE	AMOUNT	FTE
511	PROFESSIONAL SERVICES												
	43,062		33,266		50,000		50,000	50,250		50,250			
528	WORKERS COMP CLAIMS												
	147,689		306,634		200,000		150,000	150,000		150,000			
TOTAL CLASS: 10 MATERIALS & SERVICES													
	347,911		497,097		413,050		345,217	356,930		355,930			
CLASS: 25 TRANSFERS													
801	TRSFR TO GENERAL FD - OVERHEAD												
	17,390		17,163		18,741		18,741	18,974		18,974			
802	TRSFR TO GENERAL FD-ACCOUNTING												
	10,947		11,842		12,229		12,229	12,521		12,521			
816	TRSFRS TO REPROGRAPHICS FUND												
	526		455		832		832	583		550			
TOTAL CLASS: 25 TRANSFERS													
	28,863		29,460		31,802		31,802	32,078		32,045			
CLASS: 30 FUND BAL/CONTINGENCY/RESERVES													
991	CONTINGENCY - UNRESERVED												
					152,781			136,255		139,918			
998	RESERVE												
					500,000			600,000		600,000			
TOTAL CLASS: 30 FUND BAL/CONTINGENCY/RESERVES													
					652,781			736,255		739,918			
TOTAL PROGRAM: 0014 SELF-INS WORKERS COMP INS													
	495,313	.85	649,526	.85	1,227,682	.85	506,425	1,262,728	.85	1,266,657	.85		

BP WORKSHEET & JUSTIFICATION

FUND: 706 INSURANCE AGENCY FUND
 DEPT: 40 INSURANCE DIVISION
 PROGRAM: 0014 SELF-INS WORKERS COMP INS

OBJ	OBJECT DESCRIPTION
	JUSTIFICATIONS

511 PROFESSIONAL SERVICES
 OSHA REQUIRED HEARING TESTS @ APPROX. (250X \$35) \$8,750
 OSHW CONTRACT \$4,000
 WC ADMIN FEES (TRISTAR (\$16,800), PROVIDENCE MCO AND KAISER MCO, PRE CERTIFICATIONS) \$20,000
 BBP/VACCINATIONS (250 X \$50) \$12,500
 WC HEARINGS, ADDITIONAL ADMIN FEES, ETC \$5,000

528 WORKERS COMP CLAIMS
 EXPECTED PAYMENTS FOR WORKERS COMPENSATION CLAIMS \$150,000

801 TRSFR TO GENERAL FD - OVERHEAD
 ALLOCATION OF OVERHEAD SERVICES PROVIDED BY THE GENERAL FUND \$18,974

802 TRSFR TO GENERAL FD-ACCOUNTING
 ALLOCATION OF ACCOUNTING SERVICES PROVIDED BY THE GENERAL FUND \$12,521

816 TRSFERS TO REPROGRAPHICS FUND
 ALLOCATION OF COPIER, GRAPHICS, PRINTING, MAILING, & POSTAGE CHARGES THROUGH REPROGRAPHICS \$550

991 CONTINGENCY - UNRESERVED

998 RESERVE
 CONTINGENCY RESERVE ESTABLISHED \$500,000 TO COVER THE MAXIMUM EXPOSURE FROM SEVERE INJURY CASE.
 \$600,000