

Scope of Work

Metro Plan Text Amendments Related to Urban Services Delivery

Draft March 29, 2004

This Scope of Work responds to direction given by the elected officials at the joint elected officials public hearing on Periodic Review Metro Plan amendments held on February 10, 2004 at the Eugene Library. Specifically, this scope addresses the non-Periodic Review issue of Metro Plan urban service delivery provisions.

LCOG staff developed this scope in cooperation with the Eugene and Springfield City Managers, Lane County Administrator, and the metropolitan Planning Directors. The draft scope will be presented to the Metropolitan Policy Committee (MPC) at its April 11, 2004 meeting for review and comment and will be finalized through individual meetings with the three local elected bodies.

BACKGROUND:

The purpose of this scope of work is to identify, obtain consensus on, and proceed expeditiously to submit for adoption Metro Plan amendments to address the need to revise the Metro Plan policy framework related to urban services.

The current policy framework for urban services in the Metro Plan dates back to 1982 when the Metro Plan was initially adopted. Over the ensuing 22 years, the demographics of the region have changed as have the legal and fiscal structures of the local governments. These changes have resulted in a disconnect between the metro area's policy framework and the twin realities of local government financing limitations and changes in the federal, state, and local legal requirements and options. There is general agreement among staff and local officials in the three metropolitan jurisdictions that this is a good time to revisit the Metro Plan policies in order to provide greater flexibility in providing urban services and to be responsive to these changed conditions.

OBJECTIVES:

The specific objectives are:

1. To work collaboratively to improve clarity and flexibility in Metro Plan provisions relating to urban service delivery, while maintaining the growth management principles within the Metro Plan;
2. To provide information and build consensus on a framework for sound policy options for local government services in the long term as well as the short term, including regional service provision; and

3. To proceed as expeditiously as possible with Metro Plan amendments to implement Objectives #1 and 2.

TIMEFRAME: May through December 2004

WORK PROGRAM:

Step 1. Form a Metro Services Team and Metro Services Policy Group May 2004

- a. The Metro Services Team will include metro area Planning Directors, Development Services Directors, City Managers, County Administrator, County Assessor, and LCOG Executive Director. The team will be facilitated by LCOG staff. Local government legal and financial staff will review and help prepare background materials and options.
- b. The Metro Services Policy Group will include the metro area elected officials serving on the Metropolitan Policy Committee (MPC) representing the Lane County Board of Commissioners and the Eugene and Springfield City Councils. The Policy Group will provide guidance to the staff team and will help to facilitate consensus among policy makers. The Group will meet at key points in the process to provide guidance and review and comment on materials and proposals.

Step 2. Literature Search and Document Review May 2004

- a. Research background on Metro Plan urban service delivery policy, including Fundamental Principles of the plan that affect urban service delivery.
- b. Review recent studies on the topic, including the LCOG “White Paper on Special Districts” (February 2001), City of Eugene paper “A Review of Special Districts as a Means to Deliver Urban Services in the Eugene-Springfield Metropolitan Area” (November 2001), and others.
- c. Coordinate with and review written materials produced by or for the League of Oregon Cities and Oregon Special Districts Association; and review Boundary Commission standards and recent history of actions regarding special districts in Lane County.
- d. Research studies on the delivery of urban services in a property tax limitation environment, including various models available for the delivery of urban services from other states.
- e. Summarize results in a draft paper, “Pros and Cons of Various Urban Service Delivery Options.”

- f. Route paper to local financial and legal staff for review and comment. Make revisions.

Step 3. Convene Metro Services Team June 2004

Convene Metro Services Team in work session(s) to review paper and clearly articulate the full scope of issues and services to be addressed in this effort. The Fundamental Principles of the Metro Plan will serve as a guide for the scope of the effort. Changes, if any, needed to this section of the plan will be identified and addressed through scope changes as early in the process as possible.

Step 4. Identify and describe Metro Plan policy framework related to urban service delivery and prepare options or proposal. July-Aug 2004

- a. Identify the text in the Metro Plan that addresses the issues, services, and processes identified in Steps 2 and 3.
- b. Present options or proposal for changing the text to address the issues.
- c. Route paper to local financial and legal staff and Boundary Commission staff for review and comment. Make revisions.
- d. Meet with Metro Services Team to review and discuss and to agree on an approach or optional approaches.
- e. Prepare proposed or optional Metro Plan text amendments.
- f. Meet with the Metro Services Policy Team and legal and financial staff for review and comment.
- g. Revise proposal or options.

Step 5. Schedule public hearings and conduct stakeholder and public outreach Aug 2004

- a. Schedule joint planning commissions public hearing for late September and send 45 day notice to DLCDD.
- b. Schedule joint elected official public hearing for October.
- c. Prepare Public Outreach Plan and convene the Joint Planning Commissions Committee to approve.
- d. Convene group of key stakeholders, including service providers subject to potential Metro Plan amendments and, if appropriate, the Boundary Commission.
- e. Hold public event in early September, 2004 to obtain feedback on options or proposal.

Step 6. Conduct local official review and adoption process Sept–December 2004

- a. Prepare responses to public comments and issues.
- b. Hold Joint Planning Commissions Public Hearing (decision on Metro Plan amendments to be made the same night as and directly following the hearing).
- c. Hold Joint Elected Officials Public Hearing in October.

- d. Hold individual elected officials meetings October – November for deliberation and decision.
- e. Submit notice of adoption to DLCD

BUDGET:

Staff time for this scope of work will be covered by the FY04 and FY05 Metro Contracts.

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