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**KEIZER POLICE FEE TASK FORCE**  
**AGENDA**

**Tuesday, October 28, 2025, 6:00 PM**  
**Keizer City Council Chambers**  
**930 Chemawa Road NE**  
**Keizer**

**Zoom: <https://us02web.zoom.us/j/82103261960>**

**Phone one-tap:**  
**+16699006833,,82103261960# US**

- 1. CALL TO ORDER**
- 2. APPROVAL OF MINUTES**
  - a. September 25, 2025**
- 3. DISCUSSION**
  - a. 2025 Departmental Analysis and Staffing Overview**
  - b. Next Steps**
- 4. ADJOURN**

*“Agenda Management Services are being supported, in whole or in part, by federal award number 21.019 awarded to City of Keizer by the U.S. Department of the Treasury.”*



## MINUTES KEIZER

Thursday, September 25, 2025

Hybrid Meeting: In-Person (Keizer City Council Chambers) and via Zoom

Zoom Link: <https://us02web.zoom.us/j/86474329952>

Phone one-tap: +16699006833,,86474329952# US

Join via audio: +1 719 359 4580 US

- 1. Call to Order** Council President Starr called the meeting to order at 6:00 p.m.  
Roll call was taken as follows:

**Present:**

Shaney Starr, Council President  
Kyle Juran, Councilor  
Daniel Kohler, Councilor

**Staff:**

Adam Brown, City Manager  
Andrew Copeland, Police Chief

**2. Discussion regarding Scope of Work, Information Needed and Next Steps**

City Manager Adam Brown summarized the police services fee motions from a June City Council meeting as follows:

- To delay the \$.69 increase and come back to the Council no later than the second meeting in November
- To establish a Task Force to study the funding and operational needs of the Police Department.
- The purpose was to have an advisory vote on a fee increase that may be placed on the November 2026 ballot.

It was noted that the \$0.69 increase would generate approximately \$90,000 for the year 2026.

It was noted that there was a requirement to help other police agencies because Keizer receives help from them with special and expert resources and how this impacts staffing in Keizer.

The increase of costs for fuel, health, liability, and workers' compensation insurance, vehicle maintenance, vehicle costs, equipment, and other City line items have exponentially increased—and had been more than the cost of living.

Police Chief Copeland suggested that the Task Force consider what it would look like if the current staffing levels were reduced, which types of officers

would be lost, and what services this community wanted to retain.

Mr. Brown commented on how important it was not to be in a position of having to catch up with the costs and services.

Discussion ensued on the efficiency rate, happiness of the police staff, the conviction rate, and concern by the community not to raise taxes.

**Data and Information Requested:**

The Police Fee Task Force requested the following for future analysis:

- Historical and current calls for service and consideration of the original five extra police positions to the need to maintain the current number of officers with inflation—from the inception of the police fee to present.
- Time and resource breakdown for types and number of calls.
- Staffing roles, types of officers, and organizational structure.
- Officer workload and service impact modeling.
- Best practices data for public safety staffing and property tax rates from comparable Oregon cities and nationally.
- Influx of property tax revenue.
- License Plate Reader (LPR) impact and data on how that has brought costs down.
- Demographic reporting requirements and time needed for police officers to complete and submit the reports.
- Shared service agreements with other jurisdictions.

**Timeline for Action Items:**

<b>Task</b>	<b>Responsible Party</b>	<b>Approximate Due Date</b>
Compile call data & staffing breakdown	Police Department	October 9, 2025
Collect comparable City data	City Staff	October 9, 2025
Schedule and confirm next meetings: October 28 <sup>th</sup>	Task Force Lead	Right away
Analyze LPR and body cam data	Police Department and IT	Ongoing
Collective review and synthesization of data	Task Force	October 28 <sup>th</sup>
Draft visual materials for public presentation	Staff and Consultants	Prior to final recommendation

It was noted that the City Council requested to receive an advisory recommendation from this Task Force for the second Council meeting in November 2025.

**3. Adjourn**

Meeting adjourned: 6:50 p.m.

Minutes approved: \_\_\_\_\_

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# 2025 Departmental Analysis and Staffing Overview

October 2025

City of Keizer, Keizer Police Department



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## Section 1: Department Overview

The Keizer Police Department (KPD) serves the City of Keizer with professionalism, accountability, and an unwavering commitment to public safety. Our mission is to provide responsive and community-focused policing through collaboration, integrity, and innovation.

- KPD is organized into three major divisions: Patrol, Criminal Investigations (CID), and Support Services. Each division performs distinct yet interconnected roles essential to our mission.
- Patrol provides frontline policing, responding to calls for service, conducting proactive enforcement, and maintaining community engagement.
- CID conducts complex investigations, manages major crimes, and coordinates intelligence-led operations.
- Support Services oversees records management, evidence handling, and administrative support critical to overall departmental efficiency.

KPD continues to integrate technology, specialized training, and interagency partnerships to optimize service delivery. However, staffing limitations continue to impact operational capacity, officer morale, and the department’s ability to meet community expectations.

## Section 2: Comparative Data Overview

KPD operates efficiently within constrained resources compared to similar Oregon cities. The table below compares sworn staffing, population, and tax rates across jurisdictions.

City	Sworn	Non-Sworn	Population	Officers per 1,000	Tax Rate
<b>Lake Oswego</b>	47	27	40,804	1.174	4.58
<b>McMinnville</b>	41	-	34,434	1.19	5.02
<b>Albany</b>	66	35	57,304	1.151	6.39
<b>Oregon City</b>	47	12.5	37,072	1.26	4.40
<b>Tigard</b>	80	20	55,972	1.42	-
<b>Tualatin</b>	38	6	27,049	1.22	—
<b>Woodburn</b>	41	9.5	31,069	1.31	6.53
<b>Canby</b>	28	6	17,776	1.57	3.97
<b>Grants Pass</b>	57	6	39,075	1.45	4.13
<b>Redmond</b>	55	15	37,009	1.48	—
<b>Keizer</b>	41 (2.5 paid by SKSD)	9	38,564	1.06 (or 0.998)	2.08

**Average officers per 1,000 residents: 1.265**

KPD maintains one of the lowest officer-to-population ratios in the state, despite comparable community size. This disparity affects response times, officer workload, and limits proactive enforcement.

## Police Fee Comparison

KPD operates efficiently within constrained resources compared to similar Oregon cities. The table below compares sworn staffing, population, and tax rates across jurisdictions.

City	Monthly Fee	Purpose / Notes
<b>Albany</b>	\$14.82	Fire, police, parks, library, court
<b>Florence</b>	\$5 → \$15 → \$18	Monthly
<b>Independence</b>	\$20 → \$17	Effective January 2025
<b>Gresham</b>	\$17	Police, fire, parks
<b>Keizer</b>	\$10.90	Parks and police
<b>Troutdale</b>	\$15	Police and fire
<b>Grants Pass</b>	\$12.36	Public safety fee
<b>Dallas</b>	\$12.50	Police, fire, EMT
<b>Jacksonville</b>	\$79	Police, fire (income-based)
<b>Lebanon</b>	\$18	Public safety
<b>McMinnville</b>	\$13	Public safety, parks, library
<b>Monmouth</b>	\$10.25	Police
<b>North Bend</b>	\$15	Public safety
<b>Salem</b>	\$15.88 + \$2.80	City operations & streetlights
<b>Sandy</b>	\$4.50	Additional police officer
<b>St. Helens</b>	\$10 + \$3	Police station + parks
<b>Sutherlin</b>	\$6	Public safety
<b>Turner</b>	\$3	Public safety
<b>Veneta</b>	\$4	Public safety
<b>Winston</b>	\$9	Public safety & transportation

Observation: Keizer's \$10.90 monthly fee remains below regional averages, while still funding both parks and police services. The majority of Oregon municipalities charge between \$12–\$18 per month for public safety alone, underscoring the cost-efficiency but also the financial limitation of Keizer's model.

## Employee Cost Comparison

City	Annual Budget	Total Employees	Avg \$ for each emp
<b>Tualatin</b>	\$10,582,920	44	\$240,520
<b>Lake Oswego</b>	\$17,493,500	74	\$284,313
<b>Woodburn</b>	\$13,055,760	51.5	\$252,284
<b>McMinnville</b>	\$12,008,731	45	\$266,687
<b>Albany</b>	\$23,523,850	101	\$232,909
<b>Oregon City</b>	\$15,340,400	61	\$251,481
<b>Tigard</b>	\$29,125,472	95	\$306,583
<b>Canby</b>	\$9,324,495	37	\$252,013
<b>Keizer</b>	\$11,545,600	50	\$230,912

The average cost of an employee is **\$256,422**, while the average cost of a **Keizer employee is \$230,912**, placing **Keizer \$25,510 below the overall average**. This indicates that the City of Keizer is already operating more cost-effectively than the broader benchmark. Further reductions in staffing or resources would likely have a disproportionate negative impact, as costs are already below average and efficiency gains have been largely realized.

## Section 3: Patrol Division

### Structure and Operations

The Patrol Division is the backbone of the Keizer Police Department, providing 24-hour emergency response, proactive patrol, and community engagement. Each patrol team is supervised by a Sergeant overseeing four to five officers per shift. Supervisors manage calls for service, reports, and field training while also handling collateral duties.

Operational Highlights:

- Patrol officers respond to a wide range of calls: disturbances, traffic collisions, domestic violence, thefts, and person crimes.
- Officers handle both proactive and reactive policing while maintaining administrative duties such as report writing and evidence processing.
- Staffing shortages often require reassignment from specialized units (Traffic or Detectives) to maintain minimum patrol coverage.
- This dynamic can cause backlogs in investigations, overtime dependence, and decreased officer wellness.

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### Patrol Sergeant

A patrol sergeant supervises a day or night shift team consisting of four patrol officers (the night shift team has five patrol officers when we are at higher staffing levels). During a work shift, a patrol sergeant reviews their team's reports that have been submitted. The sergeant will either approve a report or reject it with corrections needing to be made. The sergeant reviews pursuits and use of force incidents their team is involved in. They provide guidance to patrol officers when needed. They coordinate response to in-progress calls (burglary, assault, elude, armed person) which includes requesting resources (UAS, K9, negotiator, etc.) and coordinating perimeters. They communicate with the Patrol Lieutenant when appropriate (barricaded subject, serious injury or fatal crashes). They coach and counsel patrol officers when improvement is needed. The sergeant can be assigned an administrative inquiry to complete in the role of a fact finder. The sergeant follows up on complaints. The sergeant can have collateral duties such as (Peer Support Coordinator, FTEP Coordinator, UAS Coordinator, Firearms Coordinator, Cadet Supervisor, Ride-Along Coordinator, etc.).

If a sergeant vacancy occurs, the department must reassign one from another unit, reducing supervision elsewhere and further straining leadership coverage.

### Typical Day & Responsibilities

Patrol sergeants supervise teams, review reports, and coordinate complex operations.

- Shift Start: 6:50 AM or 6:50 PM
  - Put on uniform and equipment, prepare patrol vehicle.
  - Lead shift briefing, sharing updates and guidance with the patrol team.
- Primary Duties:

- Report Review and Approval: Approve or return reports with required corrections. Ensure reports meet documentation standards, proper evidence entry, and legal requirements.
- Officer Guidance: Provide direction and mentorship to patrol officers.
- Operational Coordination: Respond to in-progress calls (burglary, assault, elude, armed persons).
- Coordinate resources: UAS, K9, negotiators, perimeter setups.
- Communicate with Patrol Lieutenant on critical incidents (barricaded subjects, serious injuries, fatal crashes).
- Collateral Duties: Peer Support Coordinator, FTEP Coordinator, UAS Coordinator, Firearms Coordinator, Cadet Supervisor, Ride-Along Coordinator.
- Shift End: 7:10 PM or 7:10 AM (unless overtime is required)

## Patrol Officer

A patrol officer works on a day or night shift team consisting of three other officers and one patrol sergeant (total of 5). Patrol officers respond to a variety of different types of calls for service, conduct traffic stops, and proactively police. Patrol officers complete call narratives or reports, depending on what call for service/investigation they are dealing with. Patrol officers also have collateral duties such as field training officer, survival skills instructor, UAS operator, K9 handler, etc.

If we lost a patrol officer position, we would fill the vacancy by transferring a traffic officer, CRU detective, or general detective to the position, ensuring the patrol division was adequately staffed. This would then create more work for those remaining in the unit, and could lead to poor morale and burnout.

## Typical Day & Responsibilities

A typical day for a patrol officer includes a balance of proactive policing, responding to calls, and completing administrative tasks.

- Shift Start: 6:50 AM or 6:50 PM
  - Put on uniform and equipment, prepare patrol vehicle.
  - Prepare patrol vehicle and ensure all necessary gear is available.
  - Attend shift briefing, receiving updates on noteworthy calls and relevant information.
- Primary Duties:
  - Responding to Calls for Service: Domestic disturbances, trespass, ordinance violations, assaults, sex offenses, welfare checks, traffic complaints, restraining order violations, etc. Officers document each call in CAD or complete a report.
  - Report Writing & Paperwork: Tasks include completing required fields, writing detailed narratives, entering property/evidence, and routing associated forms (tow forms, domestic violence assessments, property forms, etc.).

- Proactive Policing: Traffic stops, addressing suspicious activity, locating stolen vehicles, conducting investigations.
  - Investigation Follow-Up: Interviews, canvassing for witnesses, obtaining video surveillance, retrieving evidence.
  - Collateral Duties: Developing lesson plans, instructing new hires, assisting with training.
  - Shift End: 7:10 PM or 7:10 AM (unless overtime is required)
- 

## Traffic Officer

The Traffic Enforcement Unit currently consists of two officers working four 10-hour shifts when we have an adequately staffed patrol unit.

If available, a traffic officer responds to all traffic crashes and calls where it is suspected a driver is intoxicated. They monitor reported parking violations, ensuring they are followed up on and addressed. They conduct traffic stops to ensure there is education and enforcement to increase traffic safety in our community. The traffic officer follows up on specific traffic safety complaints and directs their efforts towards a specific area. They help the patrol officers with calls for service as needed. The traffic officer investigates serious injury/fatal crashes with assistance from the Mid-Valley Crash Team. A traffic officer is expected to have an extensive knowledge in DUII investigations.

Loss of one traffic position could eliminate the unit entirely, forcing patrol officers to absorb crash investigations, DUIIs, and targeted enforcement, tasks that are time-intensive and require specialized training. It would reduce the resources we have available to investigate a serious injury or fatal crash, leading to us having to depend on another agency or agencies for assistance.

## Typical Day & Responsibilities

- Shift Start: 7:00 AM
    - Attend morning briefing.
    - Put on uniform and prepare all personal and vehicle/motorcycle equipment.
  - Primary Duties:
    - Report Writing: Focus on DUII investigations and traffic crashes; ensure all required fields are completed.
    - Traffic Crash Investigation: Respond to crashes, complete detailed reports, and document evidence.
    - Parking & Traffic Enforcement: Monitor parking violations, conduct traffic stops, and educate drivers.
    - Targeted Traffic Safety Efforts: Focused enforcement in areas with reported speeding or hazards.
    - Collateral Duties: Approve Drug Recognition Expert reports, traffic grant reporting, develop training for SFST and Intoxilyzer 8000.
    - Support Patrol: Assist with general calls for service when needed.
  - Shift End: 5:00 PM (unless overtime is required)
-

## Community Service Officer

As a non-sworn employee, the Community Service Officer assists sworn law enforcement personnel with non-emergency calls, completes investigations, and other related law enforcement tasks and acts as a community relations outreach for City services. They will also enforce and investigate complaints and municipal & ORS violations. The CSO tasks and responsibilities make a direct impact on Keizer livability by improving safety, addressing concerns, and fostering positive relationships between residents and law enforcement. This position splits their time between fieldwork, public engagement and community outreach, and collaborative planning with a dedicated public safety team.

### Essential Functions

Under the direction of the Patrol Lieutenant:

- Investigate violations of City ordinances and graffiti reports. Handle issues that do not require the presence of sworn law
- enforcement including, but not limited to, lost and found property, animal complaints, parking complaints, and
- homelessness.
- Enforces a variety of federal, state, and local codes and regulations, including parking, noise abatement; writes warnings
- and citations; follows up on complaints.
- Respond to dispatched calls for services. Investigate and complete reports related to “cold” calls including those involving
- missing persons, burglaries, vandalism, theft, financial crimes, stolen/recovered vehicles, fraud, and other similar
- incidents. Obtain statements and complete standard police reports for review by supervisors or sworn staff.
- Respond to dispatched calls for injury and non-injury traffic crashes and assist in facilitating the exchange of information.
- Administer first aid as needed and conduct crash investigations as needed.
- Complete documents and reports required by the City to include cases generated from online reporting.
- Provide traffic control at various incidents, including potentially hazardous conditions, traffic accidents, crime scenes, fires, funerals, special events, and power outages.

Under the direction of a police lieutenant:

- Coordinate and schedule crime prevention/public relations programs including, but not limited to, Neighborhood Watch,
- Business Watch, National Night Out, and BLAST (Bringing Law Enforcement and Students Together) Camp.
- Maintain crime prevention databases and ensures compliance with program requirements.
- Support special events which may include developing visual aids and other items for public display.

- Effectively interact with the community in person and via email/telephone correspondence; crime prevention liaison to
- various civic groups.
- Listen and report community concerns and needs relative to law enforcement and community policing.
- Create and maintains brochures, informational pamphlets, and crime prevention bulletins.
- Offer community and city resource referrals and conducts department tours.
- Recruit non-sworn volunteers.

Under the direction of the Administrative Lieutenant:

- Coordinate fleet services by assuring that vehicles and vehicle accessories are properly equipped, maintained and
- in good working order.
- Schedule and transports vehicles and equipment to repair facilities and other service shops.
- Perform minor maintenance checks, troubleshooting, and repairs as needed.
- Commission and decommission vehicles, prepares vehicles for public auction.
- Maintain accurate service records and complies with safety recall notices.
- Recruit, train and schedule fleet service volunteers.

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### Technology Advancements

The following are some examples of technology advancements that assist our patrol officers with efficiency with their work:

- Electronic ticketing and crash report system. This system is connected with other systems on the computers our officers use and cut down the time it takes to complete a warning, citation, or crash report due to the officers not having to handwrite them.
- License plate readers and parks cameras. This technology allows officers to quickly search for a specific license plate or check an area during a specific timeframe. This allows an officer to identify a suspect/suspect vehicle quicker.
- Computers in the officer's patrol vehicle. Programs on the computer allow officers to check the status of a driver's license, look at the registration of a vehicle, check to see if an individual has any warrants for their arrest, etc.

A setback with the mentioned technology at times is when connectivity issues occur, preventing the programs from being utilized.

We are excited about using body cameras in the future. Ultimately, the body cameras will be connected to a patrol vehicle and will turn on automatically when the emergency lighting is activated, or they can be manually activated. This will allow officers to capture more of the calls for service and investigations they deal with on a daily basis. When there is a complaint

made regarding an incident captured on a body camera, the time spent investigating the complaint should be significantly decreased.

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### Interagency Coordination

KPD frequently relies on mutual aid from Salem Police Department and Marion County Sheriff's Office during overlapping incidents. Similarly, KPD assists partner agencies when needed.

### Interagency Access to Resources

The patrol unit has several resources available to them, depending on the type of call for service or investigation being handled. The resources include, but are not limited to:

- Salem Bomb Squad
- Mid Valley Crash Team
- Keizer Police Department's K9s as well as other agencies' K9s.
- UAS
- The Keizer Police Department Criminal Investigation Division
- Detectives from other agencies if needed (homicides, officer involved shootings, etc.)

### SWAT

KPD has two officers assigned to the Salem SWAT Team, which has completed 33 missions since May 2024. Each callout affects local staffing, requiring backfill and increasing overtime. When our SWAT operators are called out, it can be on a day they were initially scheduled to work, or they can even be called out for an unplanned mission due to an active incident occurring when they are on duty. This then effects our staffing levels, often times causing us to call someone in to work overtime to ensure we are at minimum staffing levels. When our SWAT operators are called out for a planned or unplanned mission, it is due to the team executing a search warrant, to apprehend a barricaded subject, murder suspect, robbery suspect, etc. All of these situations require a high level of tactical training and experience to safely complete the mission.

*Over the last year and a half, the Keizer Police Department has requested Salem/Marion County SWAT assistance on four occasions.*

### Interagency Patrol Support

Our patrol officers routinely cover the Marion County Sheriff's Office, Salem Police Department, and occasionally the Oregon State Police. This coverage is part of a strategy to provide mutual collaboration and support, promoting safety for both the involved agency and the community by addressing risks more quickly. There are a variety of instances why we cover other agencies. The instances include, but are not limited to:

- Covering one of the agencies on a traffic stop within the city of Keizer or near our city limits.

- Covering one of the agencies on a suspect contact within the city of Keizer or near our city limits.
- Responding to assist other agencies with a call for service (disturbance, warrant service, an elude involving a vehicle, bicycle, or person eluding on foot where officers are needed to create a perimeter or to safely take the person or persons into custody, a shooting or stabbing incident where officers are needed to create a perimeter or to take the person or persons into custody safely. An example of this is MCSO responded to a reported shooting and asked for anyone available to respond to assist. At this time, our day shift patrol officers were on duty and our night shift patrol officers were about to begin their shift. We sent multiple officers to assist, leaving limited resources to handle calls for service within our city.
- When the Salem Police Department is busy handling a priority incident or multiple priority incidents, the Keizer Police Department typically will handle the calls for service in the north area of Salem.

#### Incidents Requiring External Assistance or Unattended Calls

It's difficult to quantify how often KPD cannot respond to a call for service, but during nights or weekend day shifts, staffing levels often leave the department just two priority calls away from needing assistance. In these cases, support is typically requested from the Salem Police Department, the Marion County Sheriff's Office, or the Oregon State Police.

Example sequence (May 2025):

1. **Call 25-7127 at 10:10 PM – In-N-Out Fight**
  - a. Situation: Three individuals were attacking one individual.
  - b. Staffing: Two patrol officers and one sergeant on duty.
  - c. Response: Suspects (juveniles) located and taken into custody.
  - d. Follow-up: Parents notified; juveniles transported to Marion County Juvenile Detention Center.
2. **Call 25-7128 at 10:48 PM – Active Fight at Bar**
  - a. Situation: One individual retrieved a firearm from a vehicle and returned to the bar.
  - b. Response: KPD requested assistance from Salem Police Department for the bar fight. Marion County Sheriff's Office assisted with custody of the three juveniles from the prior call.
3. **Call 25-7129 at 11:10 PM – Gunshot Report / Fleeing Subjects**
  - a. Situation: Caller reported hearing a gunshot, followed by a vehicle fleeing and two subjects running down the street.
  - b. Response: Patrol sergeant initially responded alone due to the other two priority calls being in progress.

This incident series underscores the fragility of small-agency staffing, where three simultaneous events can fully exhaust available resources.

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## Collateral Duties

Officers carry collateral assignments including Peer Support, Field Training, Firearms Instruction, UAS Operations, and Tactical Medicine. These functions are vital to departmental readiness but stretch available resources. A review of training instructors indicates shortages in several key areas such as Firearms, Defensive Tactics, and EVOC.

Discipline	Current Instructors	Operational Need	Status
Firearms	4	6	Understaffed
Defensive Tactics	3	5	Understaffed
Taser	2	3	Understaffed
First Aid/CPR	3	3	Adequate
Tactical Medicine	3	3	Adequate
Emergency Vehicle Operator (EVOC)	1	2	Understaffed
Baton	1	2	Understaffed
40mm	1	2	Understaffed

Collateral duties, including Peer Support, FTO, UAS operation, and SWAT, represent essential departmental functions that demand ongoing time commitments. Many of these areas remain understaffed, impacting training capacity and officer development.

### Patrol Collateral Duties:

- **UAS (Drone) Operators:** Currently, we have (5) certified UAS operators. Operationally, we need (8) UAS operators, given the increase in applicable use.
- **Field Training Officers (FTOs):** We have (1) patrol sergeant who is the Field Training Evaluation Program Coordinator. Currently we have (12) FTO's within our department. Operationally, we need (14) FTO's.
- **K9 Officers:** We have (2) K9 officers within our department. Operationally, we are fine with this amount.
- **Peer Support:** We have (1) Peer Support Coordinator and (3) peer support members. This is an adequate number given our current size of department.
- **SWAT Operators (2)**
- **Police Services Liaison** (works with dispatch center)
- **Reserve Coordinator**
- **Traffic Safety Coordinator**

### Traffic Unit Collateral Duties:

- **Drug Recognition Expert (DRE) Instructor**
- **Crash Reconstructionist**
- **Parade Coordinator**
- **Traffic Safety / Bicycle / Pedestrian Committee Liaison**
- **SFST Instructor**

- **Radar / Lidar Instructor**
  - **Intoxilyzer 8000 Instructor**
  - **Traffic Grant Project Director**
- 

## Typical Call and Response Types

### Traffic

When an officer observes a traffic violation, he will request dispatch to create a traffic call or generate it himself using our CAD system. Once the call is generated, the officer will activate his overhead lights, provide dispatch with his location, the license plate of the vehicle, and a brief description of the vehicle.

The officer will contact the driver and request his license, registration, and proof of insurance. The officer will verify that all three documents are valid and current. The officer will return to his vehicle and either complete the traffic citation or issue a verbal/written warning. The officer will re-contact the driver and explain the warning or citation.

The officer will turn off his overhead lights and advise dispatch or change his status to "leaving scene". The officer will then generate a new entry in our stop data program. The stop data program requires the officer to enter the location of the stop, the age, sex, and home zip code of the driver. The officer must also answer whether the driver's race/ethnicity was perceived before the stop, the reason for the stop, the outcome, whether a search was conducted, and whether an arrest was made.

After the stop data information is entered, the officer will complete his notes on the traffic citation. Once he submits the traffic warning or citation, the officer will enter his notes in CAD. Once all the information has been entered, the officer will update the video taken of the traffic stop on our patrol vehicle's camera system, then clear the stop.

### Domestic

With our minimum staffing, a typical domestic call usually requires a minimum of two officers, but preferably three. During our initial approach, we will have two officers make contact at the front door and the third stage towards the back of the target location, in case someone attempts to flee. Once contact is made, one officer will speak with the victim, while one or preferably two stay with the potential suspect.

If someone is taken into custody, two officers will escort the suspect to the patrol vehicle. One officer will stay with the victim and provide resources, as well as complete a domestic violence assessment form to investigate any previous incidents.

Once this is complete, the suspect will be taken to the police station, where the primary officer will complete the jail intake forms. The jail intake forms require the information of the arrest, the charges, emergency contact information, a probable cause statement, a probable cause questionnaire, and an intake questionnaire. The probable cause questionnaire asks for the details of the arrest, as well as additional victim information. The intake questionnaire asks

several questions about the suspect, including their medical history (mental health and physical health) as well as the incident itself.

The probable cause statement is a summary of the incident and an explanation of why the officer has probable cause to charge the suspect with the crime. After the officer completes these forms, he will transport the suspect to the Marion County Jail. If the suspect is injured or requests immediate medical attention, the officer will need to take them to the Salem Hospital to receive medical attention. The majority of domestic violence crimes are a mandatory arrest, so the officer will need to stay with the suspect until he is released from the hospital. Once they are released by the hospital, they can be transported to jail.

### **Burglary**

When we respond to a burglary, any available unit will respond to the location. There are several different scenarios of how we respond to a burglary. For example, if the homeowner reports someone inside their residence and signs of forced entry are present, we will immediately establish a perimeter around the residence. A UAS operator will be deployed, along with a K9, if available. When a UAS operator is deployed, an additional officer must accompany the operator and serve as their spotter.

We will request that the Marion County Sheriff's Office or the Salem Police Department respond to provide additional assistance for the immediate perimeter (around the house) and to establish a larger perimeter around the neighborhood.

For the immediate perimeter, we usually have two officers in the back of the residence, and a minimum of three officers making entry in the front of the residence to clear it. For the larger perimeter, we would have a minimum of four units and preferably an additional unit as a roamer.

If the suspect is not located inside the residence, a K9 track will be initiated. A K9 track typically includes the handler and three other officers. During this time, the UAS operator checks the general area and tracks the K9 track for any potential dangers.

If the suspect is apprehended, they will be transported in one of our patrol vehicles to the police station. The primary officer will interview the victim and process the scene with the help of other officers. We will canvass the neighborhood to see if any surveillance video could be retrieved to further the investigation. The primary officer will complete the intake paperwork and then transport the suspect to the Marion County Jail.

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## **Incident Testimonials**

### **Elude**

Officer Johnson responded to a call regarding multiple juveniles riding their motorbikes with no helmets. There had recently been two similar reports. Officer Johnson located one of the juveniles traveling at a high rate of speed through a residential neighborhood. When Officer Johnson attempted to stop the juvenile, but he eluded on the motorbike through the park.

With the help of a citizen, Officer Johnson was able to identify the residence that the juveniles were associated with. Officer Johnson located the involved juveniles. The juvenile who eluded was arrested, and the other juveniles were released to the custody of their parents. The mother of the juvenile who had eluded was very upset with her son's behavior.

#### **Burglary/Restraining Order Violation**

Officer Perez responded to a report of a burglary, which involved the victim's ex-husband, against whom she had an active restraining order. Officer Perez was able to collect enough evidence to arrest the suspect in this case, who had stolen prescription medication during the incident. Officer Perez was able to locate him and take him into custody.

#### **Attempted Burglary**

Officer Bevens responded to a late attempted burglary, where the suspect had broken out the victim's garage window. Officer Bevens was able to get surveillance video of the incident. Officer Bevens, along with his Field Training Officer (Perez), was able to positively identify the suspect in the case. The day prior, Officer Bevens and Officer Perez were on routine patrol when they encountered the suspect, who was lingering in the Keizer Station area. When he was contacted at Keizer Station, he was positively identified.

Officer Bevens was able to re-locate the suspect in this case and took him into custody. The suspect was transported to the Marion County Jail.

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## Section 4: Criminal Investigations Division (CID)

CID is led by a Lieutenant and Detective Sergeant, supervising five detectives and two School Resource Detectives. Half of the Sergeant's salary is paid by the Salem-Keizer School District (SKSD). The full salaries of both school detectives, along with their overtime, vehicles, and equipment, are paid in full by SKSD. Annually SKSD supplements the KPD budget with \$500,000.00 for 2.5 FTEs.

The introduction of technological tools such as License Plate Readers (LPRs) and mobile surveillance units has significantly improved investigative efficiency and contributed to solving major cases, including fatal hit-and-run incidents and high-value thefts. Despite these advancements, CID staffing levels remain consistent with those from 2000, a period when the division also included three School Resource Officers and one part-time Sergeant.

### Case Types Assigned to CID

CID investigates complex crimes including homicides, assaults, financial crimes, and organized retail theft.

- Homicide, Suspicious Deaths
- Sex Offenses, Child Abuse, Elder Abuse
- Domestic Violence & Assaults
- Robbery & Armed Crimes
- Major Property & Financial Crimes
- Organized Crime, Missing Persons, Internet Crimes Against Children
- Officer-Involved Incidents, Threat Assessments

### Typical Caseload Distribution and Investigation Timelines

The Keizer Police Criminal Investigation Division (CID) currently includes five general and two school detective positions, with one having been vacant since the resignation of a general detective in early 2024. One detective position is dedicated to property crimes; however, the detective in this role has been helping with the person crime caseload due to the mentioned staffing shortage. The school detectives, whose positions are funded by the school district, provide law enforcement consultation to school staff throughout the district and investigate major crimes related to schools within Keizer, such as assaults, sex offenses, or threats of violence.

Day-to-day operations for general detectives are based on the types of assigned cases and crimes involved, as cases are prioritized based on the severity of the crime and the urgency of the investigation, person crimes vs. property crimes, victim vulnerability, alleged offender's access to the victim, potential threat to the public, etc. Violent crimes are typically treated as top priority as CID supervisors triage cases routed from the Patrol Division, DHS, Internet Crimes Against Children (ICAC), and other agencies. Some investigations are resolved fairly quickly, while more major ones (homicides, shootings, sex offenses, assaults,

child abuse), may take weeks or even months to complete, requiring hundreds of investigative hours.

Detectives are normally able to manage their caseload by juggling cases and prioritizing tasks to be able to work on multiple cases simultaneously, for example, some cases can be worked on while others are awaiting results from the crime lab, subpoena or search warrant returns, etc. The number of cases in each detective’s caseload can vary ranging from 10 to 25 at any given time, as some cases are solved and new ones are assigned. Additionally, most completed investigations still remain on a detective’s radar as they move forward through the court system and may require follow-up or witness testimony.

With the current staffing levels, even when the currently vacant position is filled, CID detectives are only able to handle person crimes or major property crimes, as most property crimes have to be sent back to Patrol or go unassigned. Detectives are part of the on-call rotation, for one week at a time, often having to put some cases on hold to dedicate their time to major crime callouts, which may require more than one detective to respond. While it is difficult to estimate the time spent on each case or specific types of cases, the vast majority of the detectives’ time and effort is invested in investigations of sexual or physical abuse of children and sex offenses involving adults.

## Case Processing Time by Offense Type

### Burglary Investigation

Phase	Task Description	Estimated Man-Hours
<b>Initial Response</b>	Officer dispatch, securing scene, initial report	1–2 hours
<b>Crime Scene Processing</b>	Fingerprints, photographs, evidence collection	2–4 hours
<b>Victim Interview</b>	Statements, stolen items list, timeline reconstruction	1–2 hours
<b>Canvassing Area</b>	Interviews with neighbors, looking for witnesses	1–3 hours
<b>Evidence Processing</b>	Submitting fingerprints, DNA, stolen items data	2–6 hours (lab time varies)
<b>Review of Surveillance</b>	Gathering and analyzing video footage (if any)	2–8 hours+
<b>Follow-Up Investigation</b>	Suspect leads, checking pawn shops, background checks	5–10 hours+
<b>Report Writing</b>	Detailed reports for prosecutor and department	1–3 hours
<b>Arrest and Processing</b>	If a suspect is identified and arrested	2–5 hours
<b>Court Testimony Prep</b>	Coordination with prosecutors, reviewing case	2–4 hours

### Total Estimated Man-Hours

- Basic case (no suspect, minimal evidence): ~10–20 hours
- Moderate case (some leads, video, evidence): ~20–40 hours
- Complex case (multiple suspects, forensic evidence, arrest): 40–100+ hours

### Sex Offense Investigation

Phase	Task Description	Estimated Man-Hours
<b>Initial Report / First Response</b>	Interview victim, secure scene, collect preliminary statements	4–8 hours
<b>Victim Interview (Detailed)</b>	Conduct forensic interview (often with a specialist), use trauma-informed approach	4–6 hours
<b>Crime Scene Processing</b>	Photograph, collect physical evidence, document scene, possibly involves multiple officers	4–10 hours
<b>Suspect Interview / Interrogation</b>	Planning, miranda rights, interrogation (may take multiple sessions)	4–12 hours
<b>Forensic Medical Exam (SANE Kit)</b>	Coordination with hospital, chain of custody for evidence	2–3 hours (LE time)
<b>Witness Interviews</b>	Interview friends, family, or bystanders, possibly re-interview later	3–6 hours
<b>Digital Evidence Collection</b>	Cell phone/computer imaging, search warrants, review of text messages, online activity	10–30+ hours
<b>Evidence Analysis Coordination</b>	Lab processing (DNA, toxicology), coordination with crime labs	2–4 hours (LE time)
<b>Report Writing / Case File Prep</b>	Detailed narrative report, evidence logs, interview summaries, warrant attachments	8–15 hours
<b>Prosecutor Coordination</b>	Meetings, case review, follow-up requests, testifying at grand jury (if applicable)	3–6 hours
<b>Follow-Up Investigations</b>	Supplemental interviews, new leads, responding to prosecutor needs	5–15+ hours

Estimated Total Man-Hours:

- Standard Case: 50–100 hours
- Complex Case (e.g., multiple suspects, child victims, digital evidence): 100–300+ hours

### Felonious Assault Investigation

Phase	Task Description	Estimated Man-Hours
<b>Initial Response &amp; Scene Securing</b>	Patrol officers	4–6 hours
<b>Crime Scene Investigation</b>	CSI techs, detectives	8–20 hours
<b>Evidence Collection &amp; Processing</b>	Forensic specialists, lab techs	10–30 hours
<b>Victim Interview</b>	Detectives, victim advocate	2–5 hours
<b>Suspect Interview / Interrogation</b>	Detectives	4–10 hours
<b>Witness Interviews</b>	Detectives	5–15 hours
<b>Video/Surveillance Review</b>	Detectives or analysts	5–20 hours

<b>Medical Records Analysis</b>	Detectives, legal review	2-4 hours
<b>Report Writing &amp; Case File Prep</b>	Detectives, admin staff	8-12 hours
<b>Legal Coordination (DA/prosecutor)</b>	Detectives, legal team	4-6 hours
<b>Follow-ups &amp; Additional Leads</b>	Detectives	5-10 hours

Total Estimated Man-Hours: 57-138+ hours

This range reflects a basic to moderately complex case the total man-hours can easily exceed 200-300 hours if the case involves:

- Multiple suspects
- Gang involvement
- High-profile victims
- Inter-jurisdictional issues
- Uncooperative witnesses

### CID Staffing and Collateral Duties

Collateral duties are responsibilities assigned to CID supervisory staff and detectives in addition to their primary investigative roles. These specialized tasks, projects, and functions support the department's mission by broadening organizational capabilities, enhancing professional expertise, and ensuring critical functions are accomplished without the need for dedicated staffing.

Role	Responsibilities	Morale Impact
<b>Lieutenant</b>	CID Commander, PIO, multiple program coordinators	Balancing administrative and operational duties can limit sergeant support.
<b>Sergeant</b>	Supervises detectives, threat assessment	High responsibility can cause workload stress.
<b>Detectives</b>	Complex investigations, school liaison, domestic violence, financial crimes, digital forensics	Satisfaction in investigative depth; stress from case backlog and collateral duties.

### Overview of Collateral Duties for CID

#### Multi-Disciplinary or Interagency Teams

- Homicide Assault Response Team (HART) – Countywide interagency major crimes team comprised of multiple law enforcement agencies
- Adult Threat Assessment Team (TAT) – Includes members from local, state, and federal public safety agencies, Department of Human Services (DHS), educational organizations, and other community partners; Reviews cases involving threats against individuals or society in general

- Child Abuse MDT – Includes law enforcement agencies, DHS, Liberty House Child Abuse Assessment Center, and other community partners; the team regularly staffs cases of alleged child abuse and neglect from around Marion County
- Child Abuse Review Team (CART) – Committee that reviews child abuse cases from prevention perspective
- Child Fatality Review Team – Similar to CART
- Domestic Violence Council
- Retail Crime Association of Oregon (ORCAOR) Law Enforcement Partner

### **Department Instructors**

- Field Training Officer (FTO)
- Firearms Instructor
- Defensive Tactics Instructor
- Emergency Vehicle Operation Course (EVOC) Instructor
- Confrontational Simulations Instructor
- Use of Force / Force-on-Force & Scenario Instructor
- Ballistic Shield Instructor

### **Surveillance and Computer Forensics**

- Computer Forensics Examiner
- Cellebrite (computer forensics software) operation
- Internet Crimes Against Children (ICAC) investigations
- Camera Technology —License Plate Reader (LPR), City Park Cameras, Remote Surveillance Platforms

### **Other Collateral Duties**

- Reserve Program Supervision
- Background Investigations
- National Integrated Ballistics Information Network (NIBIN) / Integrated Ballistics Information System (IBIS) – processing of firearms and spent casings for entry into a ballistic database)

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## **Collateral Duties by CID Member**

### **CID Lieutenant**

The Lieutenant holds a senior level management position, overseeing administrative programs, operations and activities of a division of the Police Department through subordinate supervisors and other personnel. This position provides highly responsible and complex staff assistance to the Chief of Police. Acts in the capacity of the Chief of Police during their absence. This position works with and at the direction of the Chief of Police to manage all subordinate functions of the police department; ensuring activities are consistent with

community and industry standards and expectations and in keeping with the mission of the Police Department. Personal conduct and behavior (on-duty and off-duty) must be such that it builds public confidence in the agency and its members.

- Criminal Investigation Division Commander
- Background Investigation Coordinator
- Criminal Intelligence Coordinator
- Surveillance Technology Coordinator (Drop Cars, LPRs, Parks)
- HART/CART Team Coordinator
- Immigration Applications (S & U-Visas)
- Internal Affairs Investigator
- Public Information Officer – secondary
- Student/Adult Threat Assessment Team Coordinator
- CrimeTracer Administrator
- CLEAR Administrator
- Fleet Coordinator Assistant
- NAACP Liaison
- CJAC Committee Member
- RAIN Board Member
- ALPR Administrator
- ICAC Administrator
- CALLYO Administrator
- Power DMS Administrator- secondary
- K9 Handler (Comfort/Facility K9)
- Community Response Unit Supervisor (Temp., Eff. 2024)

### **CID Sergeant**

The Sergeant plans and manages administrative and tactical operations and activities of an assigned unit or patrol shift and/or programs to include leadership, supervision, direction, training and management. The position provides overall command of assigned unit personnel and activities as it pertains to overall operations. This position directs briefing and planning activities prior to the start of a shift or specific police mission and ensures adequate staffing is present 24-hours per day. This position provides leadership, which includes motivation of department personnel, anticipation and response to organizational and community needs and positive direction in conflict resolution. This position works with and at the direction of superiors to manage subordinate functions of the police department, ensuring activities are consistent with community and industry standards and expectations and in keeping with the mission of the Police Department. Personal conduct and behavior (on-duty and off-duty) must be such that it builds public confidence in the agency and its members.

- Criminal Investigation Unit Supervisor\*
- SSRT/YSSO (SDU) Supervisor\*
- DHS Cross Reports Screener\*
- DV Council & MDT Member\*
- HART Team Coordinator (secondary)\*
- Threat Assessment Team Member\*
- Safety Committee Member

- Background Investigator
- Surveillance Technology Coordinator (Drop Cars, LPRs, Parks) – Secondary
- Fleet Coordinator Assistant – Secondary

### SSRT Detective

The Safety and Support Response Team (SSRT) is composed of community professionals dedicated to ensuring public and staff safety while supporting the educational success of students who may be at risk of behaviors leading to harm or injury. SSRT members focus on prevention, early intervention, and culturally responsive support rather than discipline, providing wrap-around services to help students succeed. Law enforcement representatives serve as liaisons and consultants to school and community partners, participating in threat assessments, safety planning, and coordination with mental health and crisis response teams. Their work emphasizes collaboration, restorative practices, and proactive strategies to maintain a safe and supportive learning environment.

- Mid-Valley Sexual Incident Response Committee (SIRC) Member\*
- Mid-Valley Student Threat Assessment Team (STAT) Member\*
- Marion County Juvenile Fire-Setter Intervention Network (JFIN) Committee Member\*
- Law Enforcement Liaison for Salem-Keizer Public Schools (SKPS) Emergency Operations Center (EOC)\*
- Consultant for SKPS Suicide Risk Assessment Team (SRA)\*
- SKPS Representative at Marion County Threat Advisory Team (TAT)\*
- Association of Threat Assessment Professionals (ATAP) Member\*
- Background Investigator
- Field Training Officer (FTO)
- KPA Vice President

### YSSO Detective

The Youth School Safety Officer (YSSO) provides community-based policing support to the Salem/Keizer School District, assisting in the prevention and investigation of juvenile-related incidents on school campuses. Duties include investigating major crimes involving juvenile victims and offenders, coordinating with DHS Child Welfare, Liberty House, and the Marion County Child Abuse Multi-Disciplinary Team, and participating in school threat assessments alongside SSRT members. YSSOs serve as liaisons to the district's Emergency Operations Center, provide critical information affecting school safety, and assist in developing strategies to prevent or mitigate dangerous situations. Additional responsibilities include processing crime scenes, collecting evidence, interviewing witnesses and suspects, preparing reports, appearing in court, serving subpoenas and warrants, responding to after-hours incidents, supporting other detectives as needed, and maintaining training and skills relevant to the role.

- Mid-Valley Sexual Incident Response Committee (SIRC) Member\*
- Mid-Valley Student Threat Assessment Team (STAT) Member\*
- Law Enforcement Liaison for Salem-Keizer Public Schools (SKPS) Emergency Operations Center (EOC)\*
- SKPS Representative at Marion County Threat Advisory Team (TAT)\*

- Association of Threat Assessment Professionals (ATAP) Member\*
- CRASH Team
- FAA Part 107 Small Unmanned Aircraft System (UAS) Pilot
- Background Investigator
- Field Training Officer (FTO)
- KPA Treasurer

### **Threat Assessment/Child Abuse Detective**

The General Detective investigates child abuse cases and conducts threat assessments, focusing on the safety and well-being of vulnerable individuals. Responsibilities include processing crime scenes, collecting and preserving evidence, reviewing reports, conducting in-depth interviews with victims, witnesses, and suspects, and preparing detailed investigative reports. Detectives collaborate with prosecutors, social services, child welfare agencies, and other law enforcement partners, appear in court as professional witnesses, assist patrol officers, and may serve on specialized teams such as HART, CART, SART, or Threat Assessment Teams. Additional duties include preparing subpoenas and warrants, providing community presentations, and maintaining investigative skills through ongoing training, while exercising discretion, professionalism, and trauma-informed practices.

- Adult Threat Assessment Team (TAT) Member\*
- Child Abuse MDT Member\*
- Child Abuse Review Team (CART) Member\*
- Child Fatality Review Team Member\*
- HART Member\*
- Background Investigator

### **Domestic Violence Detective**

The General Detective investigates major crimes with a specialized focus on domestic violence cases, as well as other incidents requiring extensive follow-up. Responsibilities include conducting thorough investigations into domestic violence, intimate partner violence, and family-related offenses, processing crime scenes, collecting and preserving evidence, reviewing reports for solvability, and conducting in-depth interviews with victims, witnesses, and suspects. Detectives prepare detailed reports, collaborate with prosecutors, social services, and child welfare agencies, and appear in court as professional witnesses. Detectives participate in on-call rotations and may respond to major incidents, assist patrol officers, and serve on specialized teams such as the Homicide and Assault Response Team (HART), Child Abuse Review Team (CART), and Threat Assessment Team (TAT). Additional duties include preparing subpoenas and search warrants, conducting background investigations, providing community presentations, and maintaining professional skills through ongoing training.

- Domestic Violence Council Member\*
- HART Member\*
- Cellebrite Operator
- Background Investigator
- Field Training Officer
- EVOC Instructor

### Property Crimes Detective

The General Detective investigates major property-related crimes, including theft, burglary, and fraud, as well as cases requiring extensive follow-up. Key responsibilities include processing crime scenes, collecting and preserving evidence, reviewing reports for solvability, conducting in-depth interviews, preparing detailed reports, and appearing in court as a professional witness. Detectives participate in on-call rotations and may respond to major incidents, assist patrol officers, and serve on specialized teams such as the Homicide and Assault Response Team (HART), Child Abuse Review Team (CART), and Threat Assessment Team (TAT). Additional duties include preparing subpoenas and search warrants, conducting background investigations, providing community presentations, and maintaining skills through ongoing training.

- Field Training Officer (FTO)
- Firearms Instructor - LOA Ending 11/08/24
- Defensive Tactics Instructor - LOA Ending 11/08/24
- Confrontational Simulations Instructor - LOA Ending 11/08/24
- Force-on-Force & Scenario Instructor - LOA Ending 11/08/24
- Ballistic Shield Instructor (Paraclete Shield) - LOA Ending 11/08/24
- Use of Force Instructor - LOA Ending 11/08/24
- Reserve Program Supervisor
- Retail Crime Association of Oregon LE Partner (ORCAOR)\*
- Employment Background Investigations\*
- Financial Activities Team Member (FiAT)\*
- Homicide Assault Response Team Member (HART)\*
- Suspicious Activity Reports POC (SARs)\*
- Oregon Homicide Investigator Association Member (OHIA)\*
- Vulnerable Adult Team Member - Temporary

### Computer Forensics Detective

The General Detective investigates major crimes and cases requiring extensive follow-up, with a focus on the collection, preservation, and analysis of digital and physical evidence. Responsibilities include processing crime scenes, reviewing reports for solvability, conducting in-depth interviews, preparing detailed reports, and appearing in court as a professional witness. Detectives participate in on-call rotations and may be called back for major incidents, assist patrol officers, and serve on specialized teams such as the Homicide and Assault Response Team (HART), Child Abuse Review Team (CART), Sexual Assault Review Team (SART), and Threat Assessment Team (TAT). Additional duties include preparing subpoenas and search warrants, conducting background investigations, providing community presentations, and maintaining skills through ongoing training.

- Child Abuse MDT Member\*
- Child Abuse Fatality Review Team Member\*
- Computer Forensics Examiner\*
- HART Member\*
- SART Member\*

- Camera Technology Operator\*
  - Celebrite Operator
  - Background Investigator
  - Defensive Tactics Instructor
- 

### **CID Mobile and Remote Surveillance Program**

Initiated in 2014, now operating on two surveillance platforms. Provides 24/7 live remote monitoring and flexible review of weeks of recorded video from the office. Replaces time-intensive physical stakeouts, reducing work hours and overtime. Has saved significant investigative resources while enhancing evidence collection. Strengthens major investigations, leading to faster case closures and justice for victims

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### **City Parks Cameras Helping Solve Crime**

Surveillance footage provides officers and detectives with invaluable evidence in investigations involving city parks. Recent examples include a major investigation involving a fight where multiple juveniles were stabbed. The system captured the incident and saved investigators significant investigative time.

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### **License Plate Reader (LPR) Cameras**

LPR cameras automatically scan and log vehicle license plates at multiple intersections; day and night, at slow and high speeds.

- Used by officers daily since program was implemented in 2024
  - Since implementation, LPR program saved significant investigative hours by helping investigators track and locate suspect vehicles
  - Helped solve countless property crimes; while recent person crimes include two fatal hit-and run crashes
- 

### **Community Response Unit (CRU)**

Mission: combats high-impact criminal activity like drug trafficking, gang violence, and property crimes through intelligence-based policing, targeted operations, and community outreach. CRU often works undercover using unmarked vehicles to conduct surveillance, serve warrants, monitor potential criminal activity, and apprehend prolific offenders, thereby improving public safety. The unit relies on public tips, community feedback, and other intelligence sources to identify high-level offenders and address emerging issues. CRU collaborates with CID detectives on significant crimes and call-outs.

Case load management:

- Gang activity
- Follow-ups from patrol

- Apprehension requests
- Drug crimes
- Chronic homeless complaints
- Weapons offenses
- Pip (problem identification and prioritization) and pop (problem-oriented policing) assignments

CRU detectives are members and actively participate in the following multi-disciplinary or interagency teams:

- Organized retail crime association of Oregon (ORCAOR)
- Keizer Poi hosts the ORCAOR Willamette Valley Chapter bi-monthly meetings
- Marion county violent crimes task force
- Detectives are deputized special federal officers/special deputy-US Marshall
- Marion county gang monthly meeting
- Marion county monthly shooting review meeting
- CRU detectives regularly partners with the local DEA task force on ongoing investigations

## Section 5: Support Services Division

The Support Services Division manages records, evidence, and administrative operations critical to departmental function. Staff handle an increasing volume of digital evidence and public records requests. Staffing consists of one lieutenant, one supervisor, three records specialists, and two property and evidence specialists.

Role	Responsibilities
<b>Lieutenant</b>	Responsibilities
<b>Support Services Supervisor</b>	Responsibilities
<b>Police Support Specialist</b>	Police Support Specialists review, process, and approve, all reports generated by our officers, detectives, and community services officer.
<b>Property &amp; Evidence Specialists</b>	Responsibilities

The Keizer Police Department's Support Services Division oversees records management, evidence handling, and administrative support critical to overall departmental efficiency.

Over 20,000 annual calls for service translates to thousands of associated documents and items of property and evidence.

In the simplest terms, reports are approved, entered into regional, state and national law enforcement databases, and routed to other agencies and courts. Property and evidence items are processed, stored, tracked, and eventually returned or disposed. Proper storage and detailed chain of custody documentation is paramount in protecting the integrity of any investigation. Our reports and items of evidence are essential for successful prosecution of crimes.

The Support Services Unit is often the first voice of the department as they answer and route phone calls, and assist a multitude of customers and visitors every day. We answer general law enforcement related questions, provide referral/resource information, satellite low-level calls for service, and return property to owners.

Many of our customers are dealing with their mental health (or that of a loved one,) and other domestic/family issues. We have also seen a marked decrease in customer self-sufficiency. We are frequently asked to look things up (directions, phone numbers, etc.) and a rough guesstimate is that 50% or more of folks that come in to speak to us about a citation have lost their citation, don't know their court date, or are lacking other important information that has been previously provided. We provide compassionate customer service and go above-and-beyond to help people every single day.

As our workload continues to increase, however, it is more difficult to provide that level of customer service, and keep up with all of our tasks – many of which are mandated by statute.

If we were to lose even one staff person, it would have a huge negative impact on our ability to provide customer service, meet our statutory obligations, and on our morale.

**Public Records Requests:**

We have received 1337 requests through September 30, which is an average of 148 requests per month, and is up 7.65% compared to the entirety of last year. 2024 was up 10% from 2023. With the exception of 2020 (COVID), we have seen a steady increase each year. At the end of September, requests had increased by 69% over the last five years.

**Records Requests by Month and Year**

	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC	TOTAL	AVERAGE	1-year increase	5-year increase
<b>2018</b>	86	85	117	98	105	122	103	115	85	108	93	85	1202	100.16		
<b>2019</b>	101	106	83	128	120	112	111	122	110	125	97	118	1333	111.08	10.90%	
<b>2020</b>	102	81	83	77	98	100	85	104	100	87	65	71	1053	87.75	-21.01%	
<b>2021</b>	79	82	93	93	114	105	99	131	114	120	103	104	1237	103.08	17.47%	
<b>2022</b>	117	146	130	116	117	111	112	113	128	134	111	117	1452	121	17.38%	
<b>2023</b>	124	112	118	114	111	138	96	134	121	162	140	133	1503	125.25	3.51%	
<b>2024</b>	168	133	143	131	139	101	135	128	136	181	116	145	1656	138	10.18%	24.23%
<b>2025</b>	138	123	185	163	167	140	136	140	145				1337	148.55	7.65%	69.29%

**Billing:**

We charge for hours spent producing large requests. Most requests from citizens are smaller (name scans, reports with less than ten pages, etc.) but we do receive large requests from other government agencies for which we do not charge (DHS for example). We charge \$18.00 for police reports (including CAD and crash reports), and \$8.80 each for name and address scans.

**Police Support Specialists**

This front office position is responsible for complex, clerical, and technical work involving extensive computer entry, retrieval, and distribution of sensitive and confidential information, front office reception, providing customer service and resources to citizens, employees, and other agencies both in person and by telephone and responsible for receiving, routing, filing and computer entry of all police incident reports and associated documents in a timely manner. The position utilizes accurate and established filing and database methods and coding to ensure accurate, complete, and detailed records of events and to enable retrieval of information as needed for criminal justice purposes. Personal conduct and behavior (on-duty and off-duty) must be such that it builds public confidence in the agency and its members.

### Responsibilities and Duties:

- Receives and disseminates information, requests, and other communications from the general public, other governmental agencies, and to appropriate department personnel in a timely and concise manner; receives and distributes departmental written communications and daily mail.
- Receives calls for service and dispatches low-priority calls.
- Receives requests for police reports and collects fees for same. May independently process such requests and/or route/mail copies of approved incident reports and related documents to appropriate requestors, outside agencies, applicable courts, insurance companies, and citizens.
- Processes Impounded Vehicle Notices, collects fees, and related documentation per City ordinance
- Performs background requests for police clearance letters, military service, other law enforcement and government agencies, etc. as directed.
- Receives and manages the day-to-day flow of paperwork throughout Support Services; assists department members in locating written and computerized information as requested.
- Enters police reports and traffic citations into the records management system ensuring accuracy and quality of each record.
- Enters, updates, and removes data for missing persons, stolen vehicles, stolen and recovered property, etc. into State and National Computer Systems as required.
- Maintains Officer Court Calendar and distributes subpoenas to personnel ordered to appear before the courts, in a timely manner.
- Performs document imaging process for record retention and retrieval.
- Assists in training new personnel.
- Participates in the purging and archiving of police files at the direction of the Support Services Supervisor.
- Directs activities of volunteers within Support Services as necessary and acts as Notary Public if properly trained/certified to do so.
- Participates in community policing activities and goals.
- May act as Law Enforcement Data System (LEDS) representative / Criminal Justice Information Standards (CJIS) Terminal Agency Coordinator. May provide support for Property and Evidence as needed.

### Typical Day & Responsibilities

Assisting a customer at the front counter can take one minute (directing them to City Hall to pay a citation, or to wait in the lobby for the council chamber doors to open for court, for example), or can take 45 minutes when the questions and matters are more complex.

Releasing a towed vehicle can take ten minutes if the person is prepared with all of the required documents, or can take a significant amount of time if they are not prepared. Sometimes this looks like the customer returning several times as they gather documents, wait for a licensed driver (if they are not a valid driver), or have additional questions. Many times, the current owner of the vehicle has not taken the steps to have it put in their name. In fact, it may have passed through several people before the current owner, and they will

bring in documents that do not reflect how the car got from the DMV-listed registered owner to the person standing before us. Helping a person navigate that takes time.

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### **Property & Evidence Specialists**

Under the general direction of the Police Support Specialist Supervisor and the lead of the Property and Evidence Specialist II, this position is responsible for all phases of property and evidence control in a highly secure environment. This position will also perform other assigned duties within the general scope of the Support Services Unit. These other assigned duties will be determined by the unit supervisor and may vary depending upon operational needs. Personal conduct and behavior (on-duty and off-duty) must be such that it builds public confidence in the agency and its members.

There is also a lead property and evidence specialist position which falls under the general direction of the Police Support Specialist Supervisor, and whose summary includes that above, as well as:

Performs as a lead worker to Property and Evidence Specialist I, temporary staff and volunteers; provides technical and non-technical training and guidance concerning work procedures; plans, assigns, and re-assigns work; monitors and approves work for completion and conformance with quality and safety standards; and provides informal assessment of workers' performance to the Support Services Supervisor. Assists and backs-up or assumes specific duties of Support Services Supervisor when needed.

#### **Responsibilities and Duties:**

- Responsible for all phases of property and evidence functions.
- Utilizes extensive knowledge in the security, storage, retrieval and disposition of evidence, found & abandoned property, contraband, and property held for safekeeping. This may include potential exposure to biological / hazardous / explosive materials and items that may be sensitive in nature.
- May be requested to accompany investigators to crime scenes for the purpose of logging and tracking evidence. May be subpoenaed to testify in court.
- Accurately documents, maintains, and preserves records for all current and historical property and evidence from submission to final dispositions. This includes, but is not limited to all digital and physical evidence. Tracks and records all movements of evidence checked out for court, for analysis, to investigators and for disposal.
- Prepares disposal manifests, court disposition requests, legal postings and financial documentation, and other required correspondence often requiring extensive research.
- May at times be requested to oversee training and the direction of duties of Property & Evidence temporary staff and/or volunteers.
- Utilizes and proficiently performs computerized Bar-coding of all property and provides information to management or others as requested.
- Procures and maintains supplies and equipment pertaining to the handling, packaging, storing and disposal of property.

- Transports evidence to and from crime labs or other agencies as needed and coordinates evidence viewings.
- Processes prescription drug drop off materials, schedules and delivers to off-site disposal site.
- Prepares items of evidence for court-required discovery and to fulfill public records requests.
- Prior to firearm release, performs complete criminal history background check on owner for prohibitions.
- Stays current with revised statutes and legal opinions pertaining to property and evidence control, technological advancements in storage, packaging and tracking methods and DNA science applicable to the property and evidence functions. Introduces and makes recommendations for improvement to management.
- Provides routine disinfection and general housekeeping of secured restricted evidence warehouse, office, two processing areas, drying room and evidence garage.
- The PES I position includes: Assists the Property and Evidence Specialist II with routine audits and inventories.
- The PES II (lead) position includes:
- Trains and directs duties of Property & Evidence regular and temporary staff and/or volunteers. Trains and instructs Police Officers with proper property/evidence procedures
- Performs and/or manages routine audits and inventories in accordance with department policy.
- Serves as Laboratory Online Information System (LOIS) Administrator.
- Represents the property and evidence room in meetings with management to include work groups within and outside the agency.
- Produces an annual report that outline statistics, project completion and goal setting.
- Ensures accuracy of the records management system as it pertains to evidence, troubleshooting system problems and errors, and working with systems support to achieve resolution.

### Typical Evidence Release

Releasing property can also be a time-consuming process. People are understandably anxious to get their items returned to them, and sometimes don't understand that we frequently have to get permission from the D.A.'s office to release their property back to them. That process can take weeks if not months at times. Random audits are conducted during the calendar year to verify that all items are properly accounted for. Each audit is performed jointly by evidence personnel and the Patrol Lieutenant, with documentation required upon completion.

---

### Property & Evidence Inventory

We currently have a total of 41,095 items of physical and digital evidence. A complete inventory of these items takes months.

	2021	2022	2023	2024	2025
<b>INCOMING</b>	4070	5058	5409	4241	3569
<b>DISPOSED</b>	4163	1672	1073	896	325
<b>TOTAL PHYSICAL AND DIGITAL AS OF 10/2/25</b>					<b>41095</b>

---

**Staffing and BWC Impact:**

We are very good at doing more with less. If one person is out of the office, we feel it. We are very conscientious about not overburdening each other, but frequently feel like we are just keeping our heads above water. We have very little, if any, time for additional projects, such as purging. We have seen a large increase in records requests in the last five years. Following the implementation of body-worn cameras, the number of additional personnel required to sustain a fully operational program has yet to be determined.

## Section 6: Agency Operational Expenses

### Vehicles

The City of Keizer Police Department's updated vehicle listing outlines upcoming replacement needs and provides a roadmap for managing future fleet expenses. Over the next several fiscal years, the department anticipates several high-cost cycles, particularly in FY 2026–27 and FY 2027–28, when multiple patrol and command vehicles are scheduled for replacement. Maintaining readiness will require not only planning for these predictable expenses but also allocating funds for unplanned maintenance and potential vehicle losses due to accidents. As many frontline patrol vehicles near the end of their service life, strategic budgeting and proactive fleet management will be essential to ensure operational reliability and cost efficiency.

#### 2021/22 Vehicle Budgeted

Description	Cost	Quantity	Total
<b>K9 vehicle</b>	\$35,000	2	\$70,000
<b>Build to include video, radio, radar, computer/printer/doc, scanner, stop sticks &amp; K9 specialty parts</b>	\$45,705	2	\$91,410
<b>CRU car</b>	10,000	1	10,000

#### 2021/22 Vehicle Budgeted

Description	Cost	Quantity	Total
<b>Detective vehicle</b>	\$30,418	1	\$30,418
<b>Build to include interior lights/tint/radio charger/siren/ Setina box</b>	\$6,000	1	\$6,000
<b>Patrol vehicle</b>	\$37,631	3	\$112,893
<b>Build to include video, radio, radar, computer/printer/doc, scanner, stop sticks</b>	\$35,680	3	\$107,040

#### 2023-24 Vehicle Budgeted

Description	Cost	Quantity	Total
<b>Patrol vehicle</b>	\$41,900	4	\$167,600
<b>CSO truck</b>	\$37,100	1	\$37,100
<b>CSO build to include interior lights/siren/tint/canopy</b>	\$6,500	1	\$6,500
<b>Patrol build includes video, radio, radar, computer/printer/doc, scanner, stop sticks, studs</b>	\$42,474	4	\$169,896

**2024/25 Vehicle Budgeted**

Description	Cost	Quantity	Total
<b>Patrol vehicle</b>	\$44,610	2	\$89,220
<b>Administration vehicle</b>	\$44,610	3	\$133,830
<b>Patrol build includes video, radio, radar, computer/printer/doc, scanner, stop sticks</b>	\$47,930	2	\$95,860
<b>Admin build to include interior lights, siren, tint, radio charger</b>	\$9,480	3	\$28,440

**2025/26 Support Division Budget Request**

Description	Cost	Quantity	Total
<b>Patrol vehicle</b>	\$43,500	2	\$87,000
<b>Administration vehicle</b>	\$43,500	1	\$43,500
<b>Patrol build includes video, radio, radar, computer/printer/doc, scanner, stop sticks</b>	\$48,950	2	\$97,900
<b>Admin build to include interior lights, siren, tint, radio charger</b>	\$11,500	1	\$11,500

**Vehicle Rotation**

Rotation narrative: I have no record or knowledge of how the rotation schedules were set originally. I can speculate the following: Vehicles with longer rotation periods are due to the vehicle being assigned to one officer versus sharing. Patrol vehicles were once a 3-year lease. We went away from leases due to the mileage we put on the vehicles and the cost associated with overages and pulling a vehicle out of the fleet for being over-mileage before the time period elapsed which in turn put more mileage on other cars. The second reason is we had no return on investment as the vehicle was turned in and we could not recoup any of the expenses put into the vehicle. For example, the PD is often able to recycle radios, radars, stop sticks and video systems between builds which can save the city money. Sergeant vehicles were once set at 6 years but with an active group of sergeants working the road and, the mileage they are putting on the cars, the rotation schedule was moved to a 4-year rotation to be congruent with their team member’s mileage rates. This change was made in 2020.

Rotation schedule:

- Administrative vehicles for command staff, detectives and CSO are scheduled to be replaced every 10 years.
- Patrol vehicles are scheduled every 4 years.
- K9 vehicles and traffic motorcycles are scheduled every 8 years.
- CRU vehicles have no schedule.
- SWAT vehicles have no schedule and are recycled former admin/detective vehicles.
- Pool vehicles have no schedule and are recycled former admin/detective vehicles.

- Surveillance vehicles have no schedule.
- Miscellaneous trailers, bicycles, RADAR reader boards have no schedule.

### Gasoline

Year	Springbrook Ending Total	Year-to-Year Increase/Decrease %	Gallons used / Avg\$ per Gal	Comments
2020	\$53,506	--	24,023 / \$2.32	Petro Statement \$53,489
2021	\$53,767	0.5%	23,369 / \$3.14	Petro Statement \$79,215
2022	\$79,381	48%	24,991 / \$3.92	Petro Statement \$85,295
2023	\$85,428	8%	25,045 / \$3.16	Petro Statement \$81,164
2024	\$81,436	5%	26,008 / \$2.90	Petro Statement \$74,462

### Vehicle Maintenance

Year	Springbrook Ending Total	Year-to-Year Increase/Decrease %	Gallons used / Avg\$ per Gal
2020/21	\$44,995	--	Vehicle break down rates are unpredictable. The longer we have a vehicle the greater the maintenance costs
2021/22	\$43,530	3.5%	
2022/23	\$34,314	21.5%	
2023/24	\$46,734	35%	
2024/25	\$41,465	12%	

### Police Vehicle Insurance Rate

Year	Springbrook Ending Total	Year-to-Year Increase/Decrease %	Gallons used / Avg\$ per Gal
2020/21	\$22,020	--	
2021/22	\$23,402	6%	
2022/23	\$24,291	4%	
2023/24	\$25,424	5%	
2024/25	\$35,099	38%	High department crash rate year

\*\*Each patrol vehicle is insured for a replacement value of \$90,000.

## Section 7: Staffing Analysis and Recommendations

KPD operates below regional staffing averages. Incremental increases in sworn and professional staff are recommended to meet service demands and reduce dependence on overtime and mutual aid.

Division	Current FTE	Recommended FTE	Morale & Operational Notes
<b>Patrol</b>	22	24	Morale strained; high call volume; collateral duties stretching staff.
<b>Traffic</b>	2	3	Staff satisfied with enforcement impact, but coverage gaps affect proactive work.
<b>CID</b>	9	14	Satisfaction in complex investigations; backlog and collateral duties reduce capacity.
<b>Support</b>	9	10	Efficient and committed; BWC and public records increase workload, potentially need additional FTE.

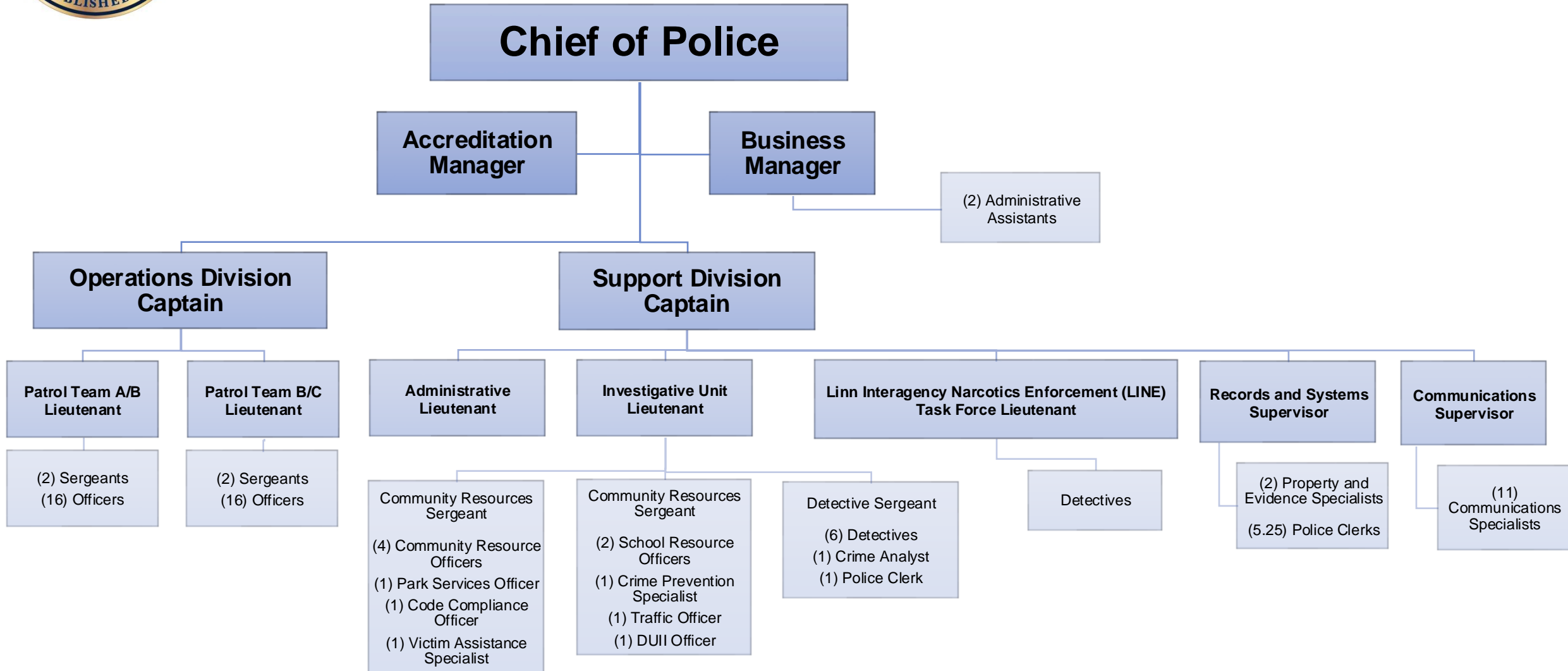
## Section 8: Conclusion

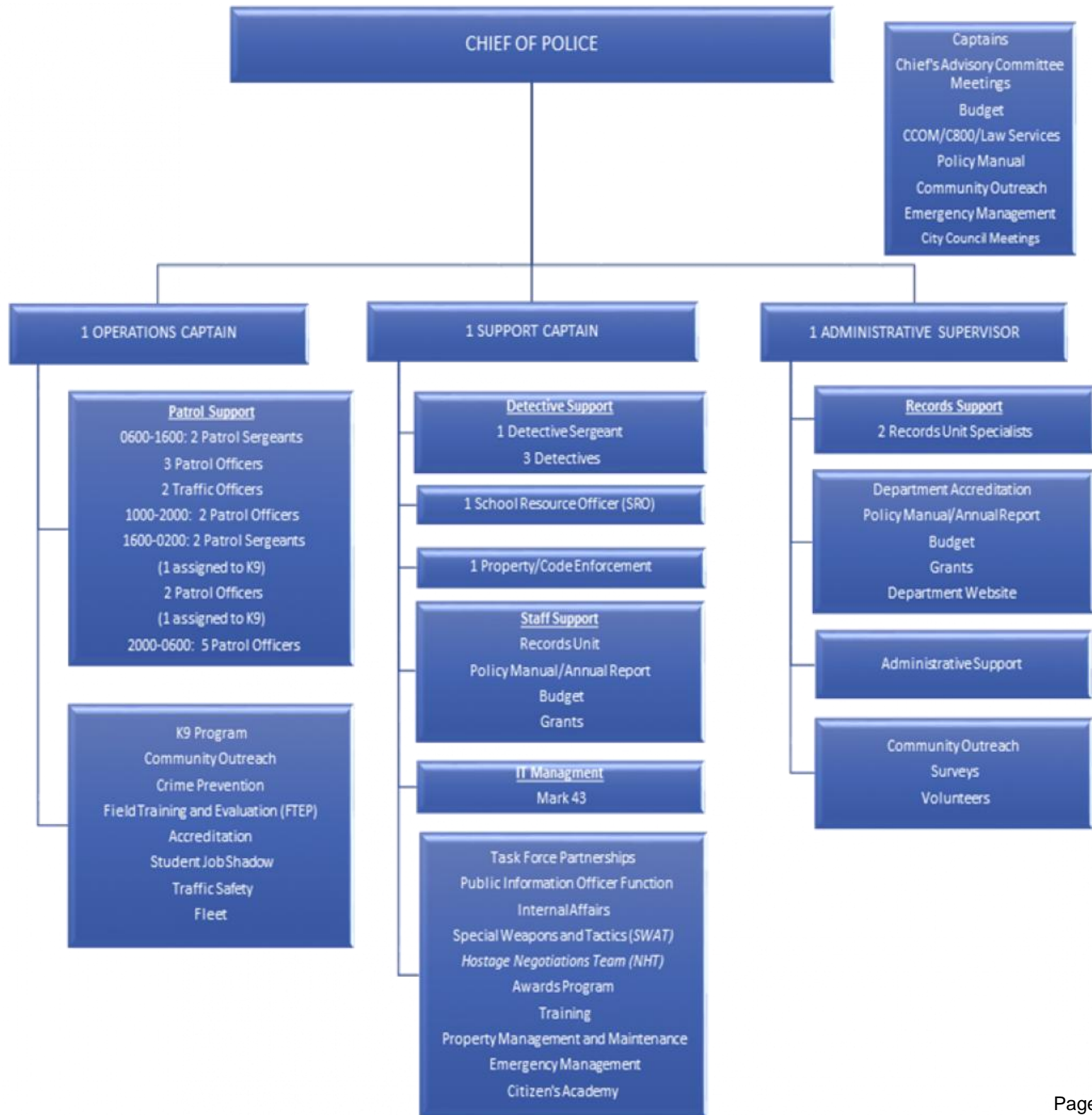
The Keizer Police Department continues to provide exceptional service within limited means. Sustaining this performance requires investment in personnel, training, and technology. This report demonstrates both the dedication of our officers and the structural challenges that must be addressed to maintain the safety and trust of the Keizer community.



# Albany Police Department

March 2025

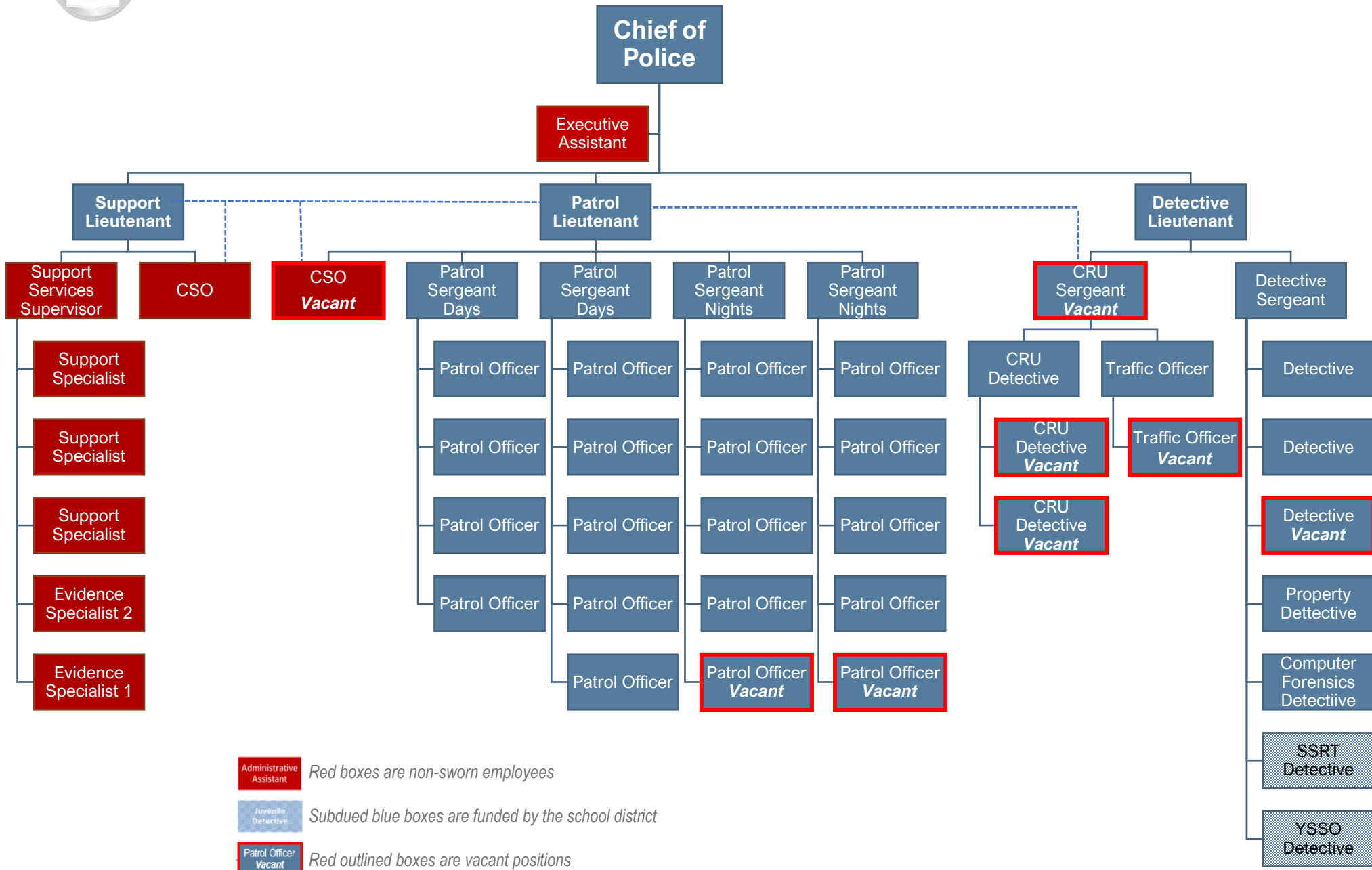






# Keizer Police Department

## Department Organizational Chart



*City of*  
**Lake Oswego**



**Biennial Budget 2025-27**





GOVERNMENT FINANCE OFFICERS ASSOCIATION

*Distinguished  
Budget Presentation  
Award*

PRESENTED TO

**City of Lake Oswego  
Oregon**

For the Biennium Beginning

**July 01, 2023**

*Christopher P. Morill*

**Executive Director**

*The Government Finance Officers Association of the United States and Canada (GFOA) presented a Distinguished Budget Presentation Award to the City of Lake Oswego, Oregon, for its biennial budget for the fiscal year beginning July 1, 2023.*

*In order to receive this award, a government unit must publish a budget document that meets program criteria as a policy document, as an operations guide, as a financial plan, and as a communications device.*

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For additional budget information visit the City’s website:  
[www.lakeoswego.city/finance/adopted-city-budget-2025-27-biennium](http://www.lakeoswego.city/finance/adopted-city-budget-2025-27-biennium)

\*Links to additional information can be found at the bottom of several pages throughout the document



## **BUDGET COMMITTEE**

### ***City Council***

Joe Buck, Mayor

Ali Afghan

Trudy Corrigan

Massene Mboup

Aaron Rapf

Rachel Verdick

John Wendland

### ***Citizen Members***

Elisabeth Zeller, Chair

Jamie Rye, Vice-Chair

Rick Ahlander

Jinwen Chai

Carrie Love

Gary Rebello

Shima Salehi

# Budget Message and City Overview



**Budget Message**

**Budget Philosophy**

**City Profile and Demographics**

**The Budget Process**

**Mission and Core Values**

**City Council Goals**

**Financial Policies**

**Organizational Chart**

# Budget Message

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## CITY MANAGER'S BUDGET MESSAGE FOR THE 2025-27 BIENNIUM

July 1, 2025

Mayor Buck, Chair, Members of the Budget Committee, and Citizens of Lake Oswego:

I am pleased to submit the 2025-2027 proposed budget for Budget Committee consideration. This proposed budget positions the City well to deliver effective and efficient municipal services that cultivate an exceptional quality of life for everyone in Lake Oswego. Budget Committee review and deliberation is critical to ensuring that the City is a careful steward of the resources it manages on behalf of the public.

As we have done in the past, we treat the operating departments in the General Fund as enterprises, which is described in greater detail in the "Budget Process and Philosophy" chapter. This biennium, departments received an increase of 4.5% in the first year and 3.5% in the second year of the biennium over their operating revenues, with two major exceptions

- **Police:** The allocation to the Police Department in the first fiscal year is 7.13% (or \$500,000), plus a one-time additional allocation of \$300,000 to upgrade our body cameras.
- **Planning.** The allocation to the Planning section of the Community Development Department in the first fiscal year is 19.34%. This represents a total of \$400,000. It is needed because the allocation for Planning has been 0% for the past three biennia, and their workplan to implement Council goals is substantial.

There are six other issues of note.

- The City's primary revenues, particularly our property tax revenues in the general fund and our utility rate revenues, are incredibly stable. Additionally, the City's historic practice of following our reserve and contingency policies put us in a strong financial position to begin the biennium.
- Funding is allocated to Council goals. This includes a proposed new Urban Forester Position and matching funds for a limited duration paramedic in the Fire Department (matching a two year a State of Oregon grant). The budget also includes funding for professional services in Planning, City Manager's Office, and LORA. Council directed capital also includes five pathways to schools and also completing the Willamette River Greenway between Roehr and George Rogers parks and the West Waluga Park pathway.

- This proposed budget includes an accurate count of the total on call staff who are required to operate the Lake Oswego Recreation and Aquatics center. In FY 2023-2025, we estimated the needed on-call FTE at 14. This proposed budget places the number higher, at the equivalent of 31 FTE, based on the updated operating plan.
- In addition to the Urban Forester and Paramedic positions, there are several other notable changes in personnel in the proposed Budget.
  - o The proposed budget adds 1 FTE split between Human Resources and Finance. Both departments face substantial increased workload because of new mandates and new City services. This new position is partially offset by eliminating a vacant .75 FTE in the City Manager's Office.
  - o The proposed budget absorbs 100% of the costs of the School Resource Officer that was previously funded by the Lake Oswego School District.
  - o The proposed budget adds 1 new FTE on the Street Crew for Public Works Operations and 2 new FTE for the Stormwater crew. These additions reflect the increasing demand for routine maintenance of both the City's streets overall and for the City's catch basins and stormwater facilities.
  - o The proposed budget includes an additional .4 FTE in the City Attorney's office for the City Prosecutor. In past budgets, this was contracted out.
- The proposed budget does not include a contribution to the Capital Reserve. In past biennium, the City was able to direct "excess" ending fund balance to Capital Reserve, which created funds that the City Council could direct to high priority projects over the biennium. There is one project budgeted in the Capital Reserve in FY 2025-2027, the purchase of a replacement fire engine.
- The proposed budget transfers \$ 3 million each of the two years of the biennium from the General Fund to the Street Fund. This is primarily allocated to pavement rehabilitation, which is budgeted at \$4 million per year for the next two years. The rest of the funds for street projects come from other fund specific revenues.

In conclusion, the proposed budget is a spending plan to address the needs of Lake Oswego, to implement the Council's goals, and to continue the long tradition of thoughtful financial stewardship of the Community's rate, tax, and fee dollars. I look forward to your deliberation.

Sincerely,



Martha Bennett, City Manager



# Budget Philosophy

The City of Lake Oswego approaches budgeting for General Fund departments similarly to how we budget for enterprise and special revenue funds. With enterprise funds (e.g., water, wastewater) and special revenue funds (e.g., transportation), departments must balance a fund's budget. The number and level of positions, the cost of union contracts, and interest earnings on invested cash are important factors in the budget, as are the costs of materials and capital spending. There is no "spend it or lose it" incentive because spending in one budget period reduces the beginning balance in the following budget period. As such Department Directors focus on the long-term health of a fund and the service provided through the fund.

Treating General Fund departments like enterprise-funds encourages a focus on outcomes, long-term thinking, and capital planning. There are five major elements to this approach:

**1. Allocation of General Revenues to Major Programs. While many general fund departments generate some revenue, they are largely dependent on general taxes and fees (primarily property taxes and franchise fees). The first step in Lake Oswego's budget process is allocating these general tax revenues to each program. Public Safety (police and fire) make up the largest allocation of general revenues. This is followed by parks and recreation, planning, library, and transfers to the street fund - all services that are strongly supported by Lake Oswego's residents.**

These allocations of general revenues reflect the priorities the City Council has placed on funding city services, and they are consistent citizen expectations and best practices in each City service area. For 2025-27, we started with the allocations approved by the City Council in the 2023-25 budget, and for the most part multiplied these amounts by the projected growth in general revenues, which were 4.5% for FY 2026 and 3.5% for FY 2027.

**2. Carryover Savings. As noted above, for enterprise and special revenue funds, any savings during a fiscal year or biennium adds to the next budget period's beginning balance, which in turn provides flexibility in funding one-time expenses such as equipment or capital improvements. This budget includes the same incentive for general fund departments, by allowing them to carry over savings and department revenues that exceed projections as a beginning balance for the department. These balances must be used for one-time expenditures that are consistent with Council priorities.**

**3. Departmental Contingency Accounts. All general fund programs in every city include contingency amounts, but they are hidden in the form of padded line items. In Lake Oswego's budget, we encouraged department managers to set aside some portion of their beginning balance in a clearly identified contingency budget, rather than hidden within line items. This contingency services as a buffer for higher than expected costs in other line items. And of course, if the contingency account isn't needed in the current budget period, it carries forward into the next budget period.**

The carryover savings program and combined departmental contingency accounts have made the City of Lake Oswego resilient to outside shocks to the financial environment.

# Budget Philosophy

**4. Responsibility for Personnel Costs. One could argue that the cost of employees is outside the control of operating managers. Salaries are set by union contracts (approved by the City Council) or by a citywide classification system. Pension costs are set by the state. Healthcare costs are also set by union contracts or through citywide contracts.**

However, operating managers set the number and level of positions in their departments. The cost of wages, health care and other benefits are known, and Department Directors are well aware of the trade-offs between personnel spending and other costs, such as materials and equipment.

After the general fund managers receive their share of general revenues, they must balance their costs, including personnel costs. The finance department projects the salary and benefit costs for each current employee, but the department heads have to add them into the budget. In other words, operating managers are responsibility for *all* the costs of providing service, including staff costs.



**5. Internal Fees for Service. To be able to provide city services, we have to account for money, recruit staff and process the payroll, provide legal advice, maintain buildings, operate a computer network, and provide other internal support services.**

The City of Lake Oswego uses a sophisticated cost allocation model - developed by an independent expert and updated by the Finance Director - to charge internal service costs to the city operating departments. The model includes an allocation of costs to general fund programs, such as police and library service, but since most of the expenses are also accounted for in general fund units (HR, IT, Finance, etc.), there is no need to transfer these amounts between funds, so they haven't been shown separately. We now show these amounts as a component of the cost of general fund services.

By fully expensing these costs, we are able to show corresponding revenue for the support service departments, so like their direct service peers, these programs become self-balancing accounts. The direct service departments are the customers of the support service departments, and the fees represent the cost of internal "contracts" for services.

## Managing the Bottom Line

The final budget adopted by the City Council set a total appropriation (spending limit) for each program in the general fund, and appropriations by categories of expense in other funds.

Where it really matters is in how the budgets are *managed*. Enterprise and special revenue fund managers have always had to manage the bottom line: regardless of estimates and authorizations (the budget), actual spending can't exceed actual total available resources. The same is true for the managers of general fund and central service programs. Actual expenses can't exceed resources. If carryover savings are less than projected, or if departmental revenues come in below projections, the manager will have to offset this on the expense side. On the other hand, if a department generates additional revenue, these funds can be used in future budget years.

## Fiscal Health and Financial Policies

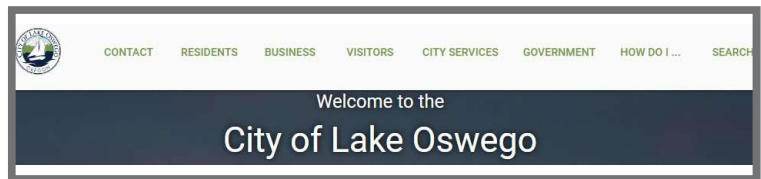
A financial policy that has served Lake Oswego well is to use one-time resources (e.g., beginning balances) to fund one time expenditures, such as capital, equipment, or special projects.

The City has also been well serviced by adhering to Council-adopted policies for the overall General Fund balance and capital reserve practices. By policy, the City sets aside 30% of general fund operating costs. This practice both recognizes that the majority of general fund resources are property taxes, which are levied in July but not collected until November and December and that the City needs to reserve funds for emergencies.

The City also has a practice of placing any “excess” funds into a capital reserve fund. In past fiscal years, this practice has protected the City against changes in the economy or construction costs. In the 2025-2027 budget, all excess funds have been allocated to high priority capital projects, including the Recreation and Aquatic Center and skatepark, and there is no contribution to the capital reserve fund.

## Budget Information Improvements

To make budget information more widely available, the City provides web-based budget information.



We also use an interactive budget dashboard that allows operating managers and citizens an at-a-glance overview of all city financial performance, with the ability to drill down to more detailed data. We also use a Capital Improvement Dashboard for real-time tracking of multi-year capital projects, showing the total project budget and the amount spent to date (across fiscal years).

## Biennial Budget

Well-managed cities pay attention to the long-term consequences of decisions. Every year, we update a six-year projection of general fund revenues and expenditures, and we adopt a two-year (biennial) budget. For 2025-27, we are continuing a biennial budget format. This doesn't, however, mean it is a static document: the City Council can and should amend it as needed. The real-time budget dashboard allows the Council and public to monitor financial performance throughout the period, and a mid-biennium review in the spring of 2026 will give the City Council an opportunity for mid-course fine-tuning.

# City Profile and Demographics

## City of Lake Oswego - Profile

Founded in 1847, the City started as an industrial town with the hope to become a booming iron production center. With the demise of the iron industry, the City’s trajectory shifted toward land development.

Located in the northwestern corner of Clackamas County on the banks of the scenic Willamette River and hugging the shore of a 405-acre lake, Lake Oswego is nestled among many of Oregon’s greatest attractions: Mount Hood, the Oregon Coast, the Columbia Gorge and nearby vineyards, farmlands, and forests. Lake Oswego is also ideally situated close to Oregon’s major metropolitan areas – just eight miles south of downtown Portland and about 45 minutes north of the state capitol in Salem.

Lake Oswego is considered one of the finest residential areas in Oregon offering full-service police and fire protection, a celebrated library, parks system planning and zoning regulation, building inspection and regulation, street maintenance and improvement, water, wastewater and surface water services.

### DEMOGRAPHICS & STATISTICS

Incorporation	1910
Government	Council/Manager
Population	41,148 (2023)
Registered Voters	30,712 (2024)
Occupied Households	~17,000
Neighborhood Associations	24
Citizen Advisory Boards	9
Community Volunteers	600 plus
Area in Square Miles	11.4
Oswego Lake	405 acres
Median Resident age	46.5

#### Culture & Recreation

Libraries	1
Public Golf Course	1
Public Indoor Tennis Facilities	1
Adult Community Center	1
Historic Iron Furnaces	1
Parks/Open Space Acreage	625

#### Public Safety

Number of Police Personnel	75
911 Calls Answered	21,642 (2024)
Fire Responses	126 (2024)
Emergency Medical Calls	3,498 (2024)
Other Service Calls	1,564 (2024)

Fire Stations	4
Number of Fire Personnel	53

#### City General Obligation Ratings

Standard & Poor’s	AAA
Mood’s	Aaa

**General Obligation Debt** \$29.805 million

**General Obligation Debt Limit** \$250 million

### ECONOMIC INDICATORS

#### Largest Employers

<i>L.O. School District</i>	838 FTE (2024)
<i>Logical Position</i>	724 (2024)
<i>Micro Systems Engineering, Inc.</i>	436 (2024)
<i>Mary’s Woods at Marylhurst</i>	436
<i>City of Lake Oswego</i>	389

**Owner Occupied Housing** 70.8% (2023)

**Median Household Income** \$140,441 (2023)

**Average Unemployment Rate** 4.0% (2024)

**Business Licenses Issued/ Renewed** 2,074 (2024)

**Real Market Value of Property** \$19.5 billion (2025)

**Assessed Value of Property** \$10.3 billion (2025)

Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/community/demographics>  
<https://www.ci.oswego.or.us/community/city-profile>

## **BUDGETING IN THE STATE OF OREGON**

A budget as defined by Oregon State Law [Oregon Revised Statutes (ORS)], is a financial plan containing estimates of revenues and expenditures for a given period or purpose. Local Governments in Oregon operate on a fiscal year the begins July 1 and ends the following June 30. Budgeting requires local governments to evaluate plans and priorities in light of the financial resources available to meet those needs. In Oregon, a budget is necessary to justify the need for a given rate and amount of property taxes.

Oregon's local governments are regulated and controlled by ORS. The state's local budget law is set out in ORS 294.305 to 294.520, and 294.555 and 294.565. These statutes provide legal standards for preparing, presenting, adopting, implementing, and monitoring the budget. Oregon local budget law has four major purposes:

1. Establish standard procedure
2. Outline programs and services and the fiscal policy to carry them out
3. Provide methods of estimating revenues, expenditures, and proposed levies
4. Encourage citizen involvement in budget formulation before budget adoption

## **BUDGETING IN THE CITY OF LAKE OSWEGO**

### **BUDGET ADOPTION**

The City of Lake Oswego prepares and adopts a budget in accordance with Oregon Budget statutes. The budget is presented by fund and department categories.

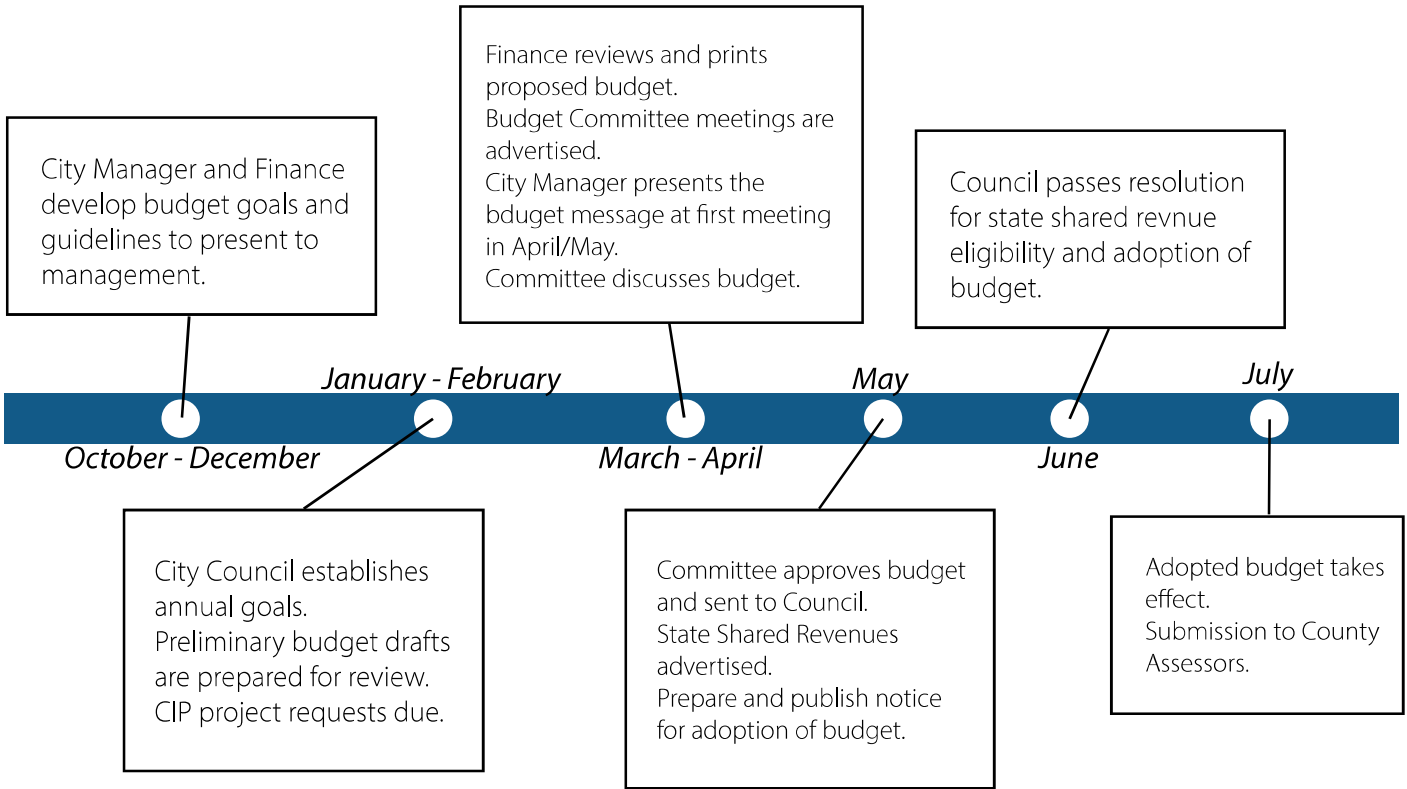
The City Manager has responsibility for management of the overall City budget and maintaining budgetary control at the approved appropriation level. Ongoing review and monitoring of revenues and expenditures is performed by the Finance Department and the appropriate operating departments. Under the City's expenditure limitation, total expenditures cannot exceed the final appropriation once the budget is adopted.

### **BUDGET AMENDMENTS**

There will be times when an adopted budget has no authority to make certain expenditure or when revenues are received for which the City had no prior knowledge. The budget may be amended during a budget period through adoption of transfer resolution or supplemental budget to authorize expenditures and/or appropriate additional revenues in the current budget period. Amendments to budget appropriations are approved by Council. By transferring appropriations, the City usually has enough flexibility to carry out the programs prescribed in its adopted budget.

# The Budget Process

## BUDGETING CALENDAR



## BUDGETING BY FUND

The City’s budget is organized on the basis of funds, or account groups, and each is considered a separate accounting entity. The operations of each fund are accounted for with a separate set of self-balancing accounts.

Governmental funds finance most of the City’s functions and include the general fund, special revenue funds, debt service funds, and capital projects funds. Proprietary funds are used to account for the City’s activities that are similar to those often found in the private sector and include enterprise and internal service. All of the City funds in the budget document are listed below and are appropriated.

Major funds represent the significant activities of the City and basically include any fund whose revenues or expenditures, excluding other financing sources and uses, constitute more than 10% of the revenues or expenditures of the appropriated budget

## BUDGETING BY FUND - TYPES

### GOVERNMENTAL FUNDS

GENERAL FUND	General Fund (Major Fund)
RESERVE FUND	Capital Reserve Fund and Capital Reserve Water Fund
SPECIAL REVENUE FUNDS	Trolley Fund; Tourism Fund; Street Fund (Major Fund); Building Fund; Public Art Fund; Bicycle Path Fund; Systems Development Charges Fund; Library Endowments Fund; and ACC Endowment Fund
DEBT SERVICE FUNDS	Bonded Debt Service Fund; and City/LORA Debt Service Fund
CAPITAL PROJECTS FUND	Assessment Project Fund; Parks Bond Fund; and Parks Recreation Center Fund

### PROPRIETARY FUNDS

ENTERPRISE FUNDS	Water Fund (Major Fund); Sewer Fund (Major Fund); Stormwater Fund (Major Fund); and Tennis Facility Fund
INTERNAL SERVICE FUNDS	Engineering Fund; Public Works Support Services Fund; and Operations Building Fund

## BASIS OF ACCOUNTING

### BUDGET BASIS

All of the funds are budgeted using the modified accrual basis of accounting in accordance with budgetary accounting practices. In modified accrual, revenues are recognized when they become measurable and available. Measurable means that the dollar value of the revenue is known. Available means that it is collectible within the current period or soon enough after the end of the current period to pay off liabilities of the current period.

Significant revenues that are considered to be measurable and available under the modified accrual basis of accounting are property taxes, franchise fees, and assessment lien installments received within approximately 60 days of the end of the fiscal year. Expenditures are recognized when the liability is incurred, except for interest on general long-term obligations which is recorded when due.

### AUDIT BASIS

The audit, as reported in the Annual Comprehensive Financial Report (ACFR), accounts for the City's finances on the basis of generally accepted accounting principles. General Accepted Accounting Principles, or GAAP, is defined as conventions, rules, and procedures necessary to described accepted accounting practice at a particular time. The modified accrual basis of accounting, a GAAP-approved method, is also used in the audit for all funds except for the Proprietary Fund Types (i.e., Water, Sewer, Stormwater, Tennis, Engineering, and Public Works Support Services). The audit uses the full-accrual method of accounting for the Proprietary Funds. The ACFR shows all of the City's funds on both a budgetary and GAAP basis for comparison purposes.

## Mission and Core Values

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## Strategic Plans - How They are Made

The City's mission to cultivate an exceptional quality of life for everyone in the community is supported by the four pillars of its core values: respect, excellence, trust, and service.

The City Council crafted their own reaffirmation policy in 2017 to uphold these standards following these values. The policy affirms its goals towards inclusivity, livability, preservation, friendly annexation, economic development, reasonable new fees/taxes, protection of property rights, development standards and community involvement, and sustainability.

Every year the council reconvenes to set up new goals based on the foundations laid out by their adopted policies. These goals drive the budget and long term planning. Resources are allocated based on maintaining current services alongside new efforts to reach these objectives. Progress is measured on a qualitative basis describing current efforts and results or predictions except for some capital improvements which can be monitored financially.

## Mission Statement

Cultivate an exceptional quality of life for everyone in our community.

### Core Values

#### Respect

We treat everyone with respect and value a diverse, inclusive and welcoming community and organizational culture. We are committed to equitable treatment and elimination of discrimination in all its forms at all organizational levels.

#### Excellence

We cultivate growth within high performing teams through being creative and innovative leaders in our respective professions. We support a culture where people celebrate successes and learn from our challenges.

#### Trust

We value the public's trust and will endeavor to always be worthy of it through ethical actions and good stewardship of resources. We believe good governance relies on transparency, and an open, honest, fair, and inclusive decision-making process.

#### Service

Our approach to customer service is relationship centered and focused on being responsive, responsible, and reasonable. We believe that the residents, businesses, and visitors to Lake Oswego should receive the highest quality public services.

Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/citymanager/mission-values>

# Council Goals

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## CITY COUNCIL GOALS

### **ENSURE A SAFE, SECURE, AND PREPARED COMMUNITY**

#### Council Initiatives

- Continue efforts to increase preparedness of Lake Oswego residents, especially seniors and people with disabilities, in event of a disaster.\*
- Redefine the 50+ Advisory Board as the Community Health and Resiliency Advisory Board.

### **SUPPORT BUSINESS INVESTMENT AND JOB CREATION IN LAKE OSWEGO**

#### Council Initiatives

- Continue to partner with Urban Development + Partners on the North Anchor redevelopment.\*
- Begin the update of the Foothills District Plan and continue to evaluate the Lake Grove Urban Renewal Plan.\*
- Elevate and update the 2022 Economic and Development Strategy and Resource Plan, including the pilot program with the Chamber of Commerce.\*
- Collaborate with the Chamber of Commerce and other community partners to promote Lake Oswego as a destination for visiting, shopping, dining, and enjoying the arts and events.

### **ATTRACT AND SUPPORT A DIVERSE POPULATION WHERE ALL PEOPLE HAVE CIVIC AGENCY, THE OPPORTUNITY TO THRIVE AND HAVE EQUITABLE ACCESS TO CITY SERVICES**

#### Council Initiatives

- Prepare a status report on the recommendations identified in the 2020 DEI Task Force Recommendations Report, specifically what recommendations were achieved, are still in progress, and are beyond our capacity to complete. Recommend a process to update the strategy.

### **COMBAT CLIMATE CHANGE AND STRENGTHEN THE COMMUNITY'S RESILIENCE TO CLIMATE IMPACTS**

#### Council Initiatives

- Adopt a sustainable buildings policy to set standards for the design, construction, and operation of City buildings that align with the Sustainability and Climate Action Plan.
- Implement action items in the 2024 Urban and Community Forest Plan (UCFP), including an update to the City tree regulations.\*
- Develop an operational plan, potential code options and communications strategy to phase out use of gas-powered yard and lawn care equipment in Lake Oswego after the City of Portland's ban goes into effect. This project should have a two-year time frame.

**Additional information can be found at the following link(s):**

<https://www.ci.oswego.or.us/citycouncil/2025-city-council-goals>

## CITY COUNCIL GOALS CONTINUED

### **STRENGTHEN PUBLIC TRUST IN THE CITY THROUGH CONTINUOUS IMPROVEMENT, OUTSTANDING CUSTOMER SERVICE, INFRASTRUCTURE INVESTMENTS, AND FISCAL STEWARDSHIPS**

#### Council Initiatives

- Collaborate with the City of Portland to make a financially and environmentally responsible long-term investment in a wastewater treatment plant.\*
- Develop a strategy for an all-ages and all-activities community center, preferably on the west side of town, that would include event and meeting spaces, public services, and may include library services. Collaborate with LOSD and other stakeholders as part of this project.\*
- Conclude the South Shore Fire Station needs assessment and launch a community engagement process.\*
- Adopt and implement a City communications plan to increase informed participation in City decisions, programs, and activities.

### **INVEST IN LAKE OSWEGO'S HIGH-QUALITY PARKS, NATURAL AREAS, AND RECREATIONAL AMENITIES**

#### Council Initiatives

- Adopt and implement Parks Plan 2040.\*

### **IMPROVE TRANSPORTATION CONNECTIONS, MOBILITY AND SAFETY FOR ALL TRAVELERS AND ALL TYPES OF TRIPS IN LAKE OSWEGO**

#### Council Initiatives

- Continue construction of sidewalks and pathways, focusing on safe routes to schools. \*
- Adopt the "20 is plenty" speed program for residential/local streets.\*

### **PLAN FOR CHANGE AND GROWTH, WITH A FOCUS ON ENHANCING THE COMMUNITY'S QUALITY OF LIFE AND SENSE OF PLACE**

#### Council Initiatives

- Begin a comprehensive review of the Development Code to identify barriers to housing production and economic development and implement code amendments to address these barriers
- Begin implementation of the near-term strategies in the Housing Production Strategy Report, including rezoning commercial and mixed-use properties, evaluating a low-income rental tax exemption program, and amending the Comprehensive Plan to adopt a fair housing policy.

## **COUNCIL GOALS PROGRESS**

The City Manager provides a progress report to Council every quarter. See the agenda and meeting materials located under meetings for the council report titled Council Goals Quarter Update.

# Financial Policies - Summary

## Financial Policies

The purpose of this section is to present the policies the City follows in managing its financial, operational, and budgetary affairs. These are general policy statements representing long-standing principles, traditions, and practices that have guided the General Policies.

Additional information can be found online at <https://www.ci.oswego.or.us/finance/financial-policies>.

## General Policies (<https://www.ci.oswego.or.us/finance/general-policies>)

The general policies of the city include:

- Carry out Council goals.
- Explicitly recognize and incorporate operating and capital budget.
- Maintain adequate reserves for liabilities, leave, and PERS.

## Revenue Policies (<https://www.ci.oswego.or.us/finance/revenue-policies>)

The revenue policies of the city include:

- Maintain diversified and stable revenue and consider market rates/ charges by others in establishing rates, fee, and charges.
- Establish user charges to the full costs of providing service.

## Expenditure Policies (<https://www.ci.oswego.or.us/finance/expenditure-policies>)

The expenditure policies of the city include:

- Expenditures shall be budgeted and controlled so as not to exceed current revenues plus the planned use of fund balance accumulated through prior years
- Operate on a current funding basis and take immediate action if deficits are projected.
- Undertake periodic staff and third-party reviews for efficiency and effectiveness.
- Make every effort to maximize discounts offered and use competitive bidding.

## Fund Balance/Contingency Policies (<https://www.ci.oswego.or.us/finance/fund-balancecontingencies-policies>)

The Fund Balance/Contingency policies of the city include:

- Maintain reserves, contingency, and ending fund balances at levels sufficient to protect the city.
- Considers when both restricted and unrestricted fund balance is available for use.

## Capital Improvement Plan (CIP) Policies (<https://www.ci.oswego.or.us/finance/capital-improvement-plan-cip-policies>)

The CIP policies of the city include:

- Develop a multi-year plan and update it annually in conjunction with the budget process.
- Maintain its physical assets at a level adequate to protect the City's capital investment and to minimize future maintenance and replacement costs.

Find additional information on the website at this link:

<https://www.ci.oswego.or.us/finance/financial-policies>

# Financial Policies - Summary

## **Capital Asset Policies** (<https://www.ci.oswego.or.us/finance/capital-asset-management-policies>)

The capital asset policies of the city include:

- Community assets won't be degraded, given away, or deteriorate except by action of the Council.
- Capitalization threshold in determining if a given asset qualifies for capitalization is \$25,000 per item.
- Adequate insurance shall be maintained on all capital assets.

## **Debt Policies** (<https://www.ci.oswego.or.us/finance/debt-policies>)

The debt policies of the city include:

- Confine long-term borrowing to capital improvements.
- Follow a policy of full disclosure on every financial report and bond prospectus.
- Ensure debt margins are within the 3% TCV (true cash value) limitation as set forth in ORS 287A.050.
- Total outstanding indebtedness, excluding voter-approved general obligation bonds, will not exceed \$400 million.

## **Investment Policies** (<https://www.ci.oswego.or.us/finance/investment-policies>)

The investment policies of the city include:

- Legality, followed by preservation of principal, is always the first objective
- City Manager is authorized to invest any surplus funds to include all bond and sinking funds into allowable investments at current market prices as described in ORS 294.035.
- Safekeeping shall be consistent with modern investment, banking, and commercial practices.
- Except special handling, the maximum stated final maturity of individual securities in the portfolio shall be three years.

## **Accounting, Auditing, & Financial Reporting Policies**

(<https://www.ci.oswego.or.us/finance/accounting-auditing-financial-reporting-policies>)

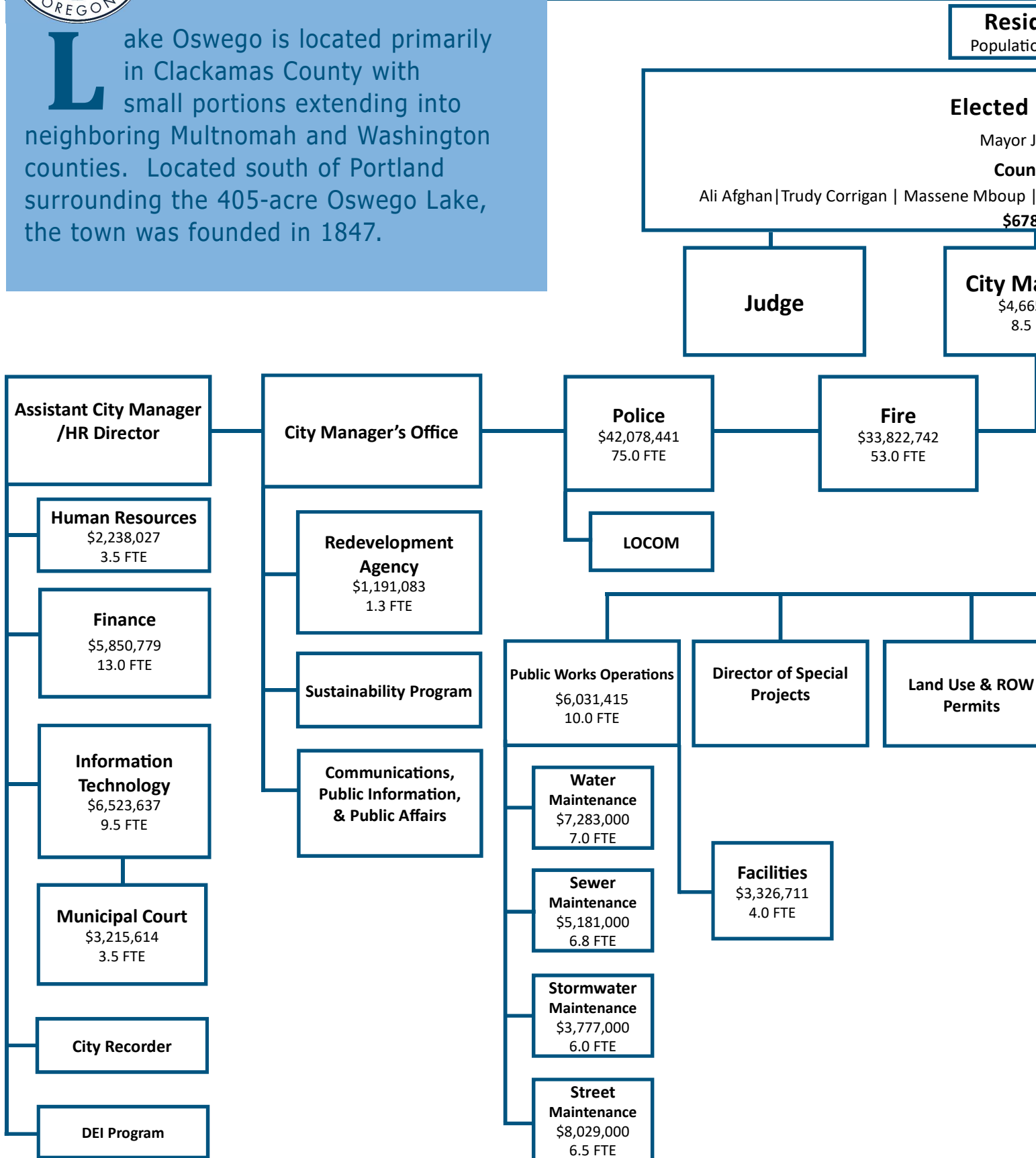
The accounting, auditing, & financial reporting policies of the city include:

- Comply with prevailing federal, state, and local statutes and regulations.
- Prepare and present regular reports that analyze, evaluate, and forecast financial performance and economic conditions.
- Seek out and employ the assistance of qualified financial advisors and consultants in the management and administration of the City's financial functions.
- An independent audit will be performed annually.

Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/finance/financial-policies>



**L**ake Oswego is located primarily in Clackamas County with small portions extending into neighboring Multnomah and Washington counties. Located south of Portland surrounding the 405-acre Oswego Lake, the town was founded in 1847.

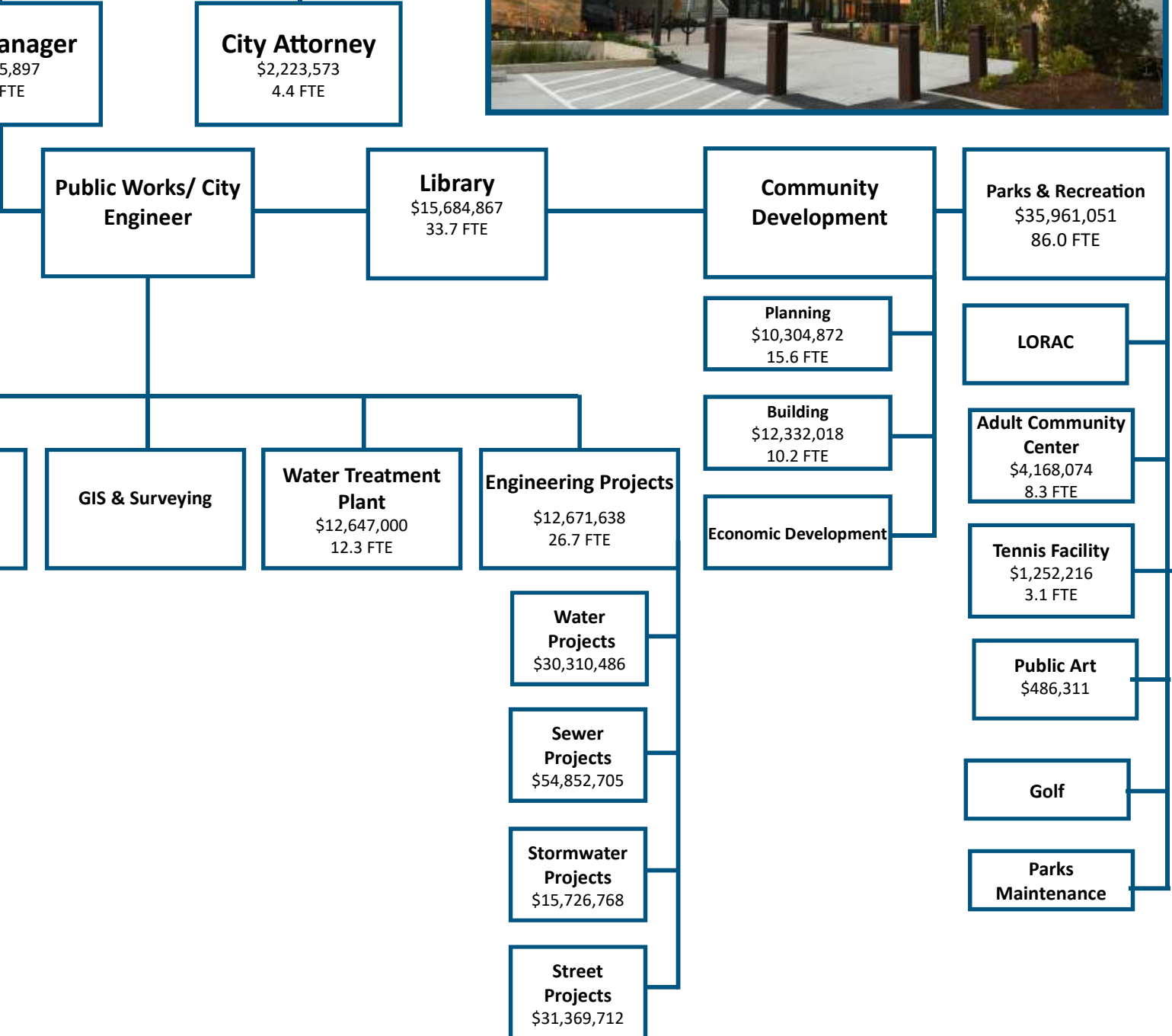


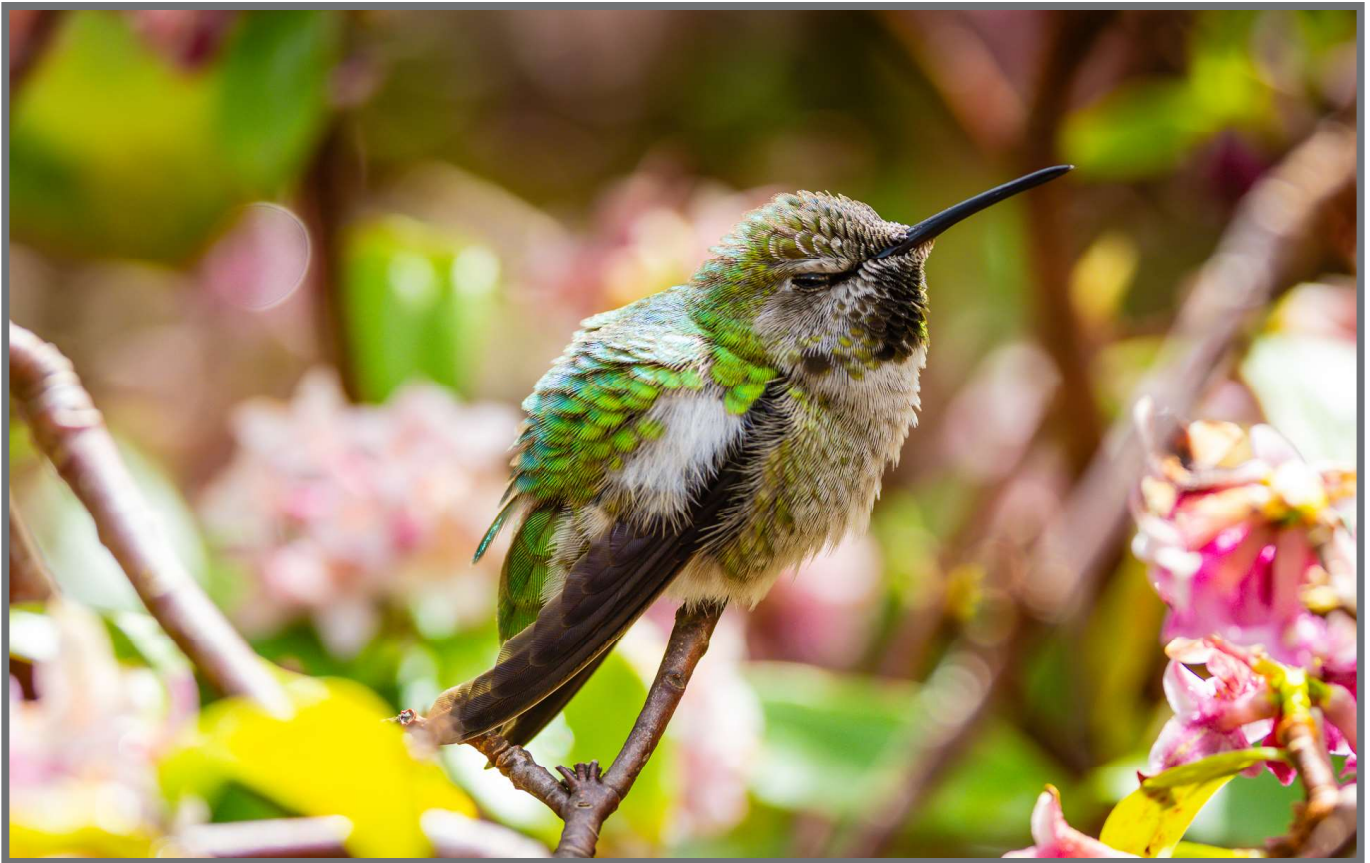
# ORGANIZATIONAL CHART

## FOR ADOPTED BUDGETS

**Deputies**  
Budget 41,149

**Officials**  
Joe Buck  
**Commissioners**  
Aaron Rapf | Rachel Verdick | John Wendland  
Budget 3,855



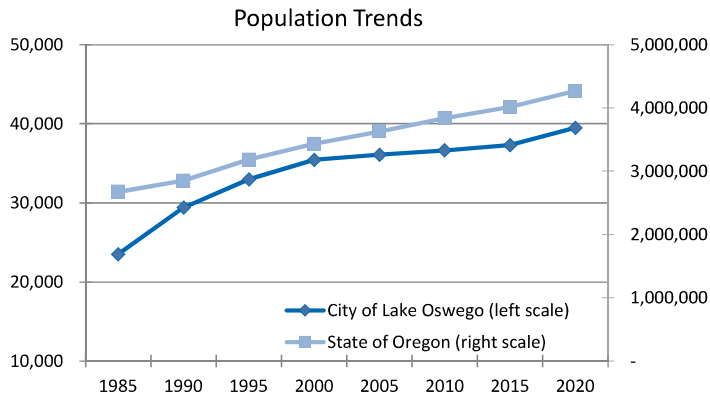




General and Economic Information  
Revenue Trends and Assumptions  
Financial Trends

# General & Economic Information

Lake Oswego is located in northwestern Oregon, south of the Portland metropolitan area, in Clackamas, Multnomah, and Washington Counties. These are among the five counties that comprise the Portland-Vancouver Primary Metropolitan Statistical Area. The City's economy is linked with that of the metropolitan area, which is based on manufacturing, national and international trade, and service industries.

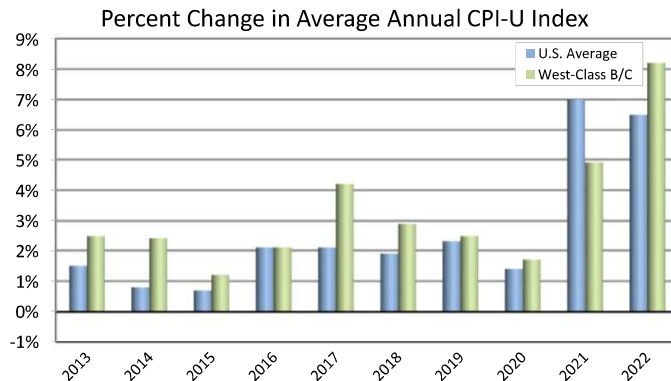


Primarily a residential community, Lake Oswego has a low level of industry and retail-based commercial activity. Most newer commercial development is along Kruse Way, a corridor on the west side near Interstate 5 — a prime section of the beltway around the southwest Portland Metro area.

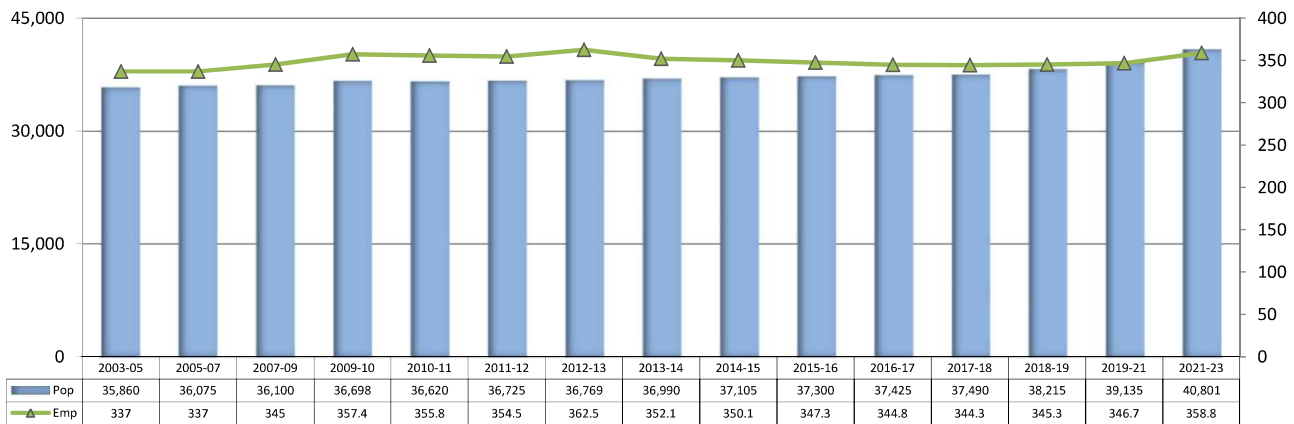
The city's population increased steadily during the 1980s and early 1990s (about 5% annually), and has increased to an estimated 39,480. The State of Oregon, population is increasing at about 1.2% annually. There is a slight increase from 2015 to 2020 with new development in downtown Lake Oswego. Future growth is estimated at about 0.6% per year.

The Bureau of Labor Statistics for the U.S. Department of Labor tracks the Consumer Price Index (CPI-U) for most U.S. cities. The CPI-U is a leading economic indicator that measures inflation, which is central to assessing the cost of living and whether living standards are rising or falling. The graph to the right shows the annual percentage change in this measure and compares the Portland area with the rest of the country.

In 2022, Portland's annual growth rate was greater than the rest of the country; about 8.2% compared to the US average of 6.5%.



City Population vs. Number of City Employees (FTEs)



This graph compares the City of Lake Oswego's population to the City's number of full-time equivalent (FTE) employees over the past two decades. For the 2023-25 biennium, the City budgeted 382.6 FTE. Expressed in per capita terms, the FTE count is 9.3 employees per thousand of population.

# Revenue Trends & Assumptions

*The purpose of this section is to describe the City's major revenue sources, explain the underlying assumptions for the revenue estimates, and discuss significant revenue trends. The revenue sources and assumptions used in this adopted budget are summarized below:*

## **PROPERTY TAXES**

Property taxes are assessed using a levy rate on each \$1,000 of assessed valuation. They are classified into three levy types: permanent rate levy for general purpose operations, local option serial levies for specific purposes approved by voters, and bonded debt levies approved by the voters for payment of general obligation bonded debt principal and interest. The City's permanent rate levy is a function of its permanent tax rate applied to its assessed value. The City's bonded debt levy is determined by the amount sufficient to cover the principal and interest payments of its general obligation debt service. Currently, the City has no local option serial levies in place.

This budget projects the tax base levy by estimating the new assessed value and applying it to the City's applicable tax rate. The estimation of the assessed value starts with the previous year's assessed value and adds three factors: a growth factor (maximum allowed by law is 3%), an allowance for new construction, and an allowance for annexed property. Prior to Measure 50, the assessed value was the same as the real market value. Since the passage of this measure in 1997-98, the assessed value had been rolled back to approximately 57% of the real market value. The City's tax rate remains the same as biennim 2023-25 in forecasting property tax revenues for 2025-27.

At \$95.9 million for the biennium, property tax revenues continue to be a major source of revenue for the City, comprising 30.1% of total operating revenues.

## **SALES & SERVICES**

Sales and services represent citizens' payments to the City for various services. These include utility services (water, wastewater, surface water, and street), fire service contracts, parks and recreation programs, as well as golf and tennis services. Revenues from utility service charges are a function of the City's customer base, usage, and the appropriate rate as outlined in the City's adopted Master Fees and Charges. Sales & Services are projected to follow a steady growth pattern. Revenues from sales and services are estimated at \$99.3 million for 2025-27, roughly 30.8% of all operating revenues.

## **LICENSES & FEES**

This revenue category includes business licenses, building permits and fees, and planning development review fees. All licenses and fees are itemized in the City's adopted Master Fees and Charges booklet that is on the Finance website. For 2025-27, revenue from licenses and fees is projected to be 7.8% of the City's operating revenues.

## **INTERGOVERNMENTAL REVENUES**

Intergovernmental revenues include federal, state, and local grant revenues, the library district funds, and state-shared revenues received from the State of Oregon. All the grant revenues directly support specific programs that are reviewed annually and adjusted to incorporate any changes in funding levels. The State of Oregon collects gas, cigarette, and liquor taxes and shares these taxes with its political subdivisions based upon a per capita distribution. Intergovernmental revenue is budgeted to be \$34.2 million, or 10.6% of total operating revenues.

# Revenue Trends & Assumptions

## INVESTMENT INCOME

Investment income is dependent upon short-term interest rates and the amount of resources available for investment. Our investment policy, as summarized in the Financial Policies section, outlines the investment objectives as follows: legality, safety of principal, adequate liquidity, avoidance of unnecessary risk, and then obtaining a market yield. Generally, the City invests heavily in the State of Oregon Local Government Investment Pool (LGIP) with a small portion invested outside of LGIP. Currently, the LGIP is earning 4.6% percent on its investments. For this coming fiscal year, the rate of return on the City's investments is projected to decrease. Investment income is budgeted in each fund based on its estimated share of pooled cash.



## FRANCHISE FEES

Franchise fees are received from several entities currently operating within the City of Lake Oswego public Right of Way (ROW). These fees are collected based upon rates applied to the gross operating revenues generated within the City. Franchise fee rates are 5% for electricity, cable, solid waste hauling, and wireline telecommunications. Currently, the City has five active franchises in the following areas: electricity, telephone, cable, broadband, and solid waste services. Natural gas and other utilities (some exceptions for wireless) are covered until the City's ROW usage fee resolutions. Franchise and/or utility usage fees paid by operators conducting business in the City's ROW are an important revenue source for the City. Revenue is estimated at \$8.8 million for 2025-27, or 2.7% of the City's operating revenues.

## CHARGE FOR SERVICES

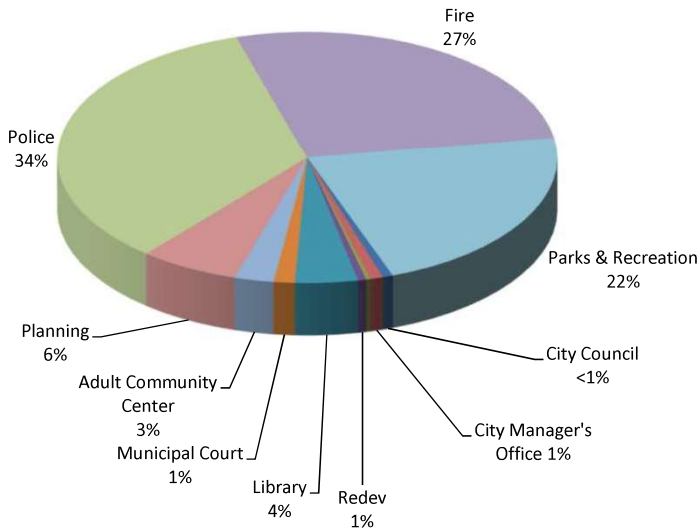
Charges for Services represent costs between departments for administrative, insurance, maintenance, and operational services and are reflected in both the resource category as well as the requirements (internal fees for service) of the respective funds. Prior to fiscal year 2013-14 the City classified these service costs as Transfers. Charges for Services represent 12.3% of revenues

## TRANSFERS

Transfers represent payments between departments for subsidizing operations or funding capital projects and are reflected in both the resource category as well as the requirements of a fund. Transfers represent 3.1% of revenue

# Financial Trends - Resources

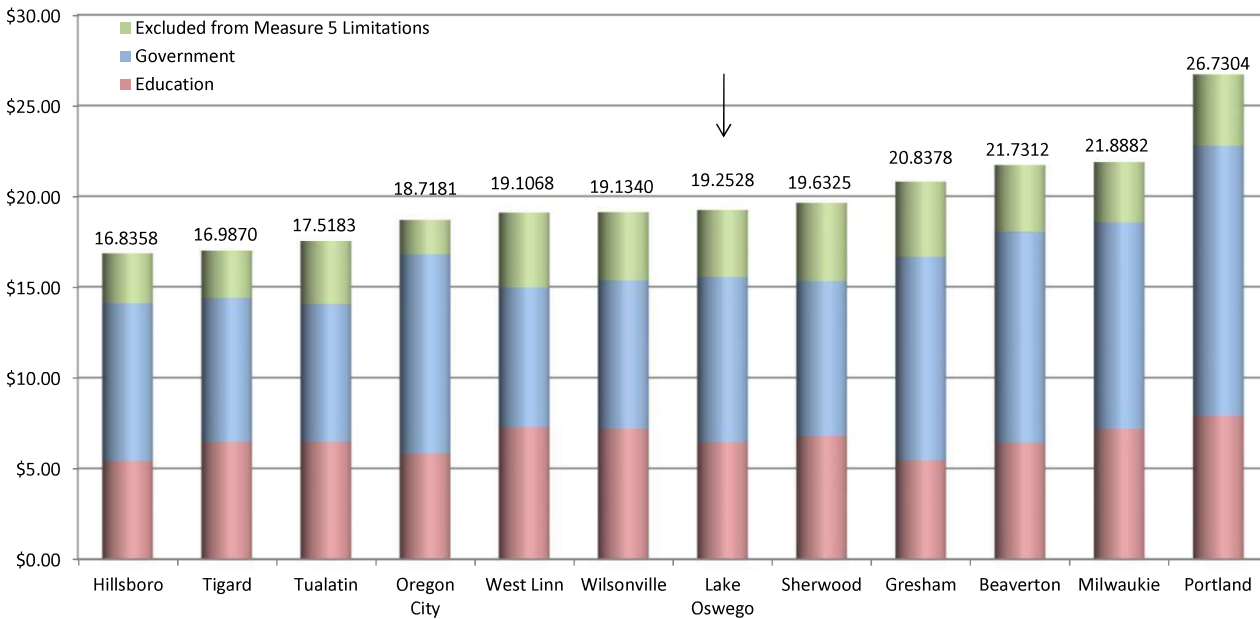
Allocation of General Revenues  
2025-27



For the 2025-27 biennium, total General Revenues allocated to various General Fund departments totaled \$102 million. A summary of general revenues can be found on page i-36.

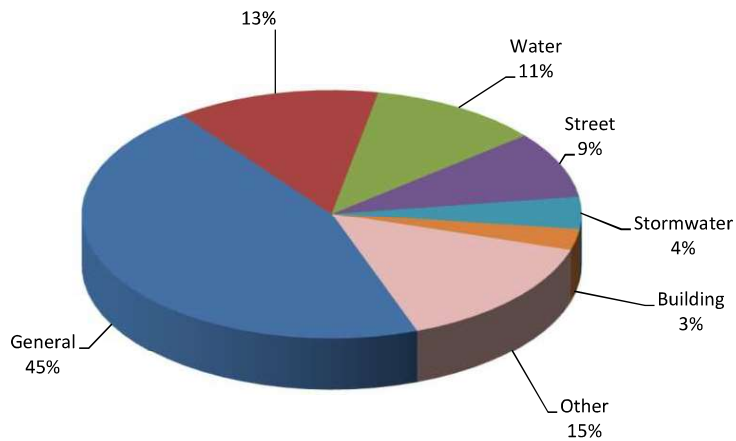
Property tax revenue is the major source of general resources for the City. Those revenues along with franchise fees and state shared revenues are included in the allocation.

Comparison of Total Property Tax Rates in Portland Metro Area - Fiscal Year 2024-25



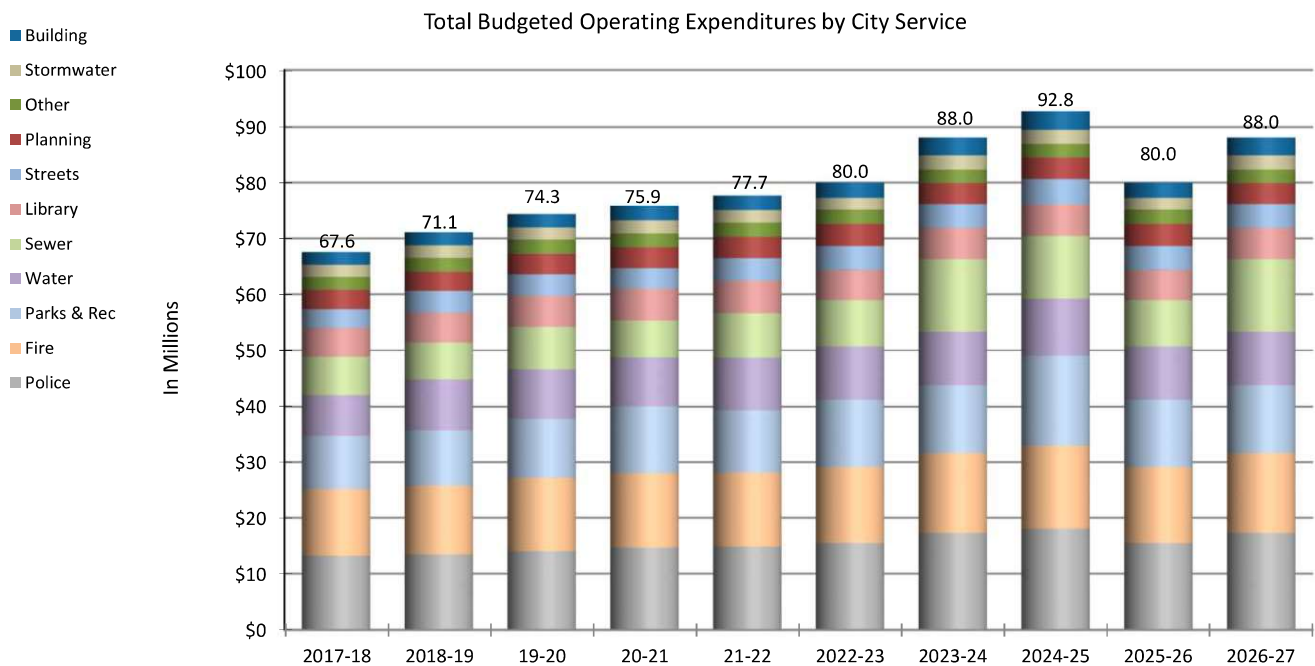
The above graph compares the City's total millage rate (based upon the largest tax code area) to other cities in the Portland metro region. Measure 5, passed by voters in 1990, divided property tax levies into three categories and established limits for each category. The categories and limits for each are: Education (\$5.00 per \$1,000 RMV), Government (\$10.00 per \$1,000 RMV), and a third category that is exempt from the limitations (usually general obligation debt).

# Financial Trends - Requirements



Requirements were balanced to 2025-27 resources at \$461.7 million. As the pie chart to the left shows, about 45% of the biennium's requirements are budgeted in the General Fund. The remaining budgeted requirements are allocated between the remaining funds — with small funds grouped in "Other".

The General Fund primary services include Police, Fire, Parks & Recreation, General Administration, Planning, and Library.



The above graph depicts operating budgets for the direct service programs within the City. For the purpose of this graph, operating budget consists of personnel services, materials and services, and internal fees for service.

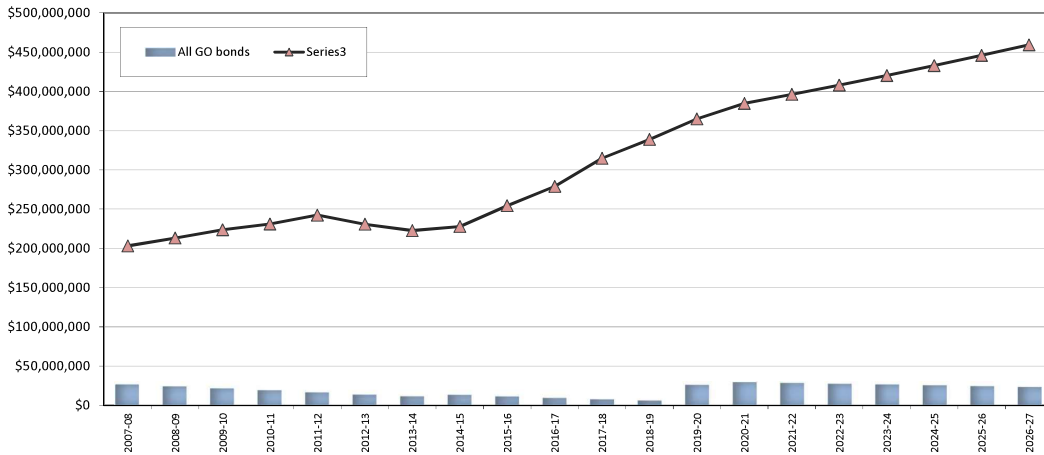
*Beginning July 1, 2019 Golf is included with Parks & Recreation.*

## OVERVIEW

The city strives to maintain a high bond rating, currently AAA / Aaa (extremely strong capacity to meet financial commitments), as well as ensure its debt margins are within 3% of true cash value in line with ORS 287A.050.

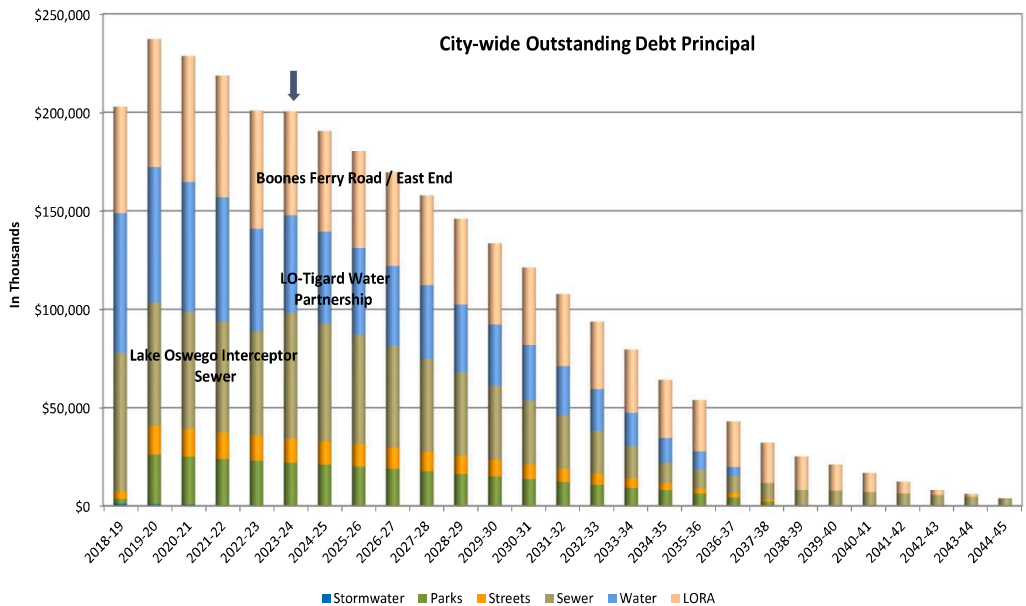
Currently the city has general obligation (GO) bonds and full faith and credit bonds. The outstanding debt of the city is just under \$200 million which is within the Council adopted policy for outstanding debt to not exceed \$400 million (not including GO Bonds). A listing for each type of debt is available at the links below.

General Obligation Bonded Indebtedness



The columns in the graph show the City's total general obligation (G.O.) debt. ORS 287A.050 sets a legal limit on G.O. bonded indebtedness at 3% of the total real market value in the city. The City's G.O. bonded indebtedness has stayed less than 1%, well below this limit.

In the last several years, the City has issued debt to fund large public infrastructure improvement and replacement projects such as the Lake Oswego Interceptor Sewer (\$110 million), and the Lake Oswego Tigard Water Partnership (\$96 million). A City Council adopted policy is for total outstanding indebtedness not to exceed \$400 million, not including voter approved general obligation bonds.



# Financial Trends - Bonded Debt

## GENERAL OBLIGATION BONDS

General obligation bonds are used to finance a variety of public projects and require voter approval. These bonds are backed by the full faith and credit of the City. The City currently has three general obligation bond issues outstanding:

	Interest rates (1)	Issued date	Maturity date	Original principal	Principal outstanding	Annual debt service	Bond Rating (2)	Payment source
Series 2015 Lake Grove/Refunding	2.00 - 5.00	2/26/15	6/1/39	10,245,000	2,775,000	250,134	Aaa/AAA	Property taxes
Series 2019 Parks	2.00 - 5.00	11/6/19	6/1/39	23,860,000	20,890,000	1,609,650	Aaa/AAA	Property taxes
Series 2023 Parks	4.00	6/1/23	6/1/42	6,140,000	6,140,000	245,600	Aaa/AAA	Property taxes
<b>Total General Obligation Bonds</b>				<b>\$40,245,000</b>	<b>\$29,805,000</b>	<b>\$2,105,384</b>		

- (1) Interest rates represent the rates on the remaining bond principal outstanding.
- (2) Bond ratings received from Moody's / Standard & Poor's reflect the City's strong financial performance.

Schedule of Future Principal & Interest Payments due

Fiscal year ended	Principal payable	Interest payable	Total
June 30, 2026	1,170,000	935,384	2,105,384
June 30, 2027	1,280,000	881,009	2,161,009
June 30, 2028	1,400,000	820,309	2,220,309
June 30, 2029	1,530,000	753,709	2,283,709
June 30, 2030	1,405,000	721,359	2,126,359
June 30, 2031	1,490,000	691,459	2,181,459
June 30, 2032	1,570,000	658,134	2,228,134
June 30, 2033	1,660,000	621,347	2,281,347
June 30, 2034	1,755,000	578,847	2,333,847
June 30, 2035	1,855,000	532,916	2,387,916
June 30, 2036	1,965,000	483,583	2,448,583
June 30, 2037	2,075,000	430,300	2,505,300
June 30, 2038	2,195,000	373,038	2,568,038
June 30, 2039	2,315,000	311,500	2,626,500
June 30, 2040	2,140,000	245,600	2,385,600
June 30, 2041	2,300,000	160,000	2,460,000
June 30, 2042	1,700,000	68,000	1,768,000
	<b>\$29,805,000</b>	<b>\$9,266,494</b>	<b>\$39,071,494</b>

	Debt outstanding	Debt per capita	Debt as % of RMV	ORS 287A.050 Statutory maximum
G.O. Bonds, debt ratios	\$29,805,000	\$755	0.25%	3.00%

# Financial Trends - Bonded Debt

## FULL FAITH AND CREDIT BONDS

Full faith and credit bonds are long-term obligations that are payable solely from a designated source of revenue. They do not carry any taxing power.

	Interest rates (1)	Original date	Maturity date	Original principal	Principal outstanding	Annual debt service	Payment source
Series 2017 Full Faith & Credit	2.00 - 5.00	12/21/17	12/1/35	44,160,000	30,700,000	3,644,525	Sewer rates
Series 2018 Full Faith & Credit*	2.00 - 5.00	5/2/18	12/1/42	51,640,000	39,300,000	3,142,063	LORA/Water/Stormwater
Series 2019 Full Faith & Credit	2.00 - 5.00	11/6/19	6/1/39	10,400,000	9,255,000	795,950	Street gas tax revenue
Series 2020 Full Faith & Credit	5.00	5/1/20	6/1/45	33,425,000	27,910,000	2,760,500	LORA/Sewer rates
Series 2023 Full Faith & Credit	5.00	6/1/23	6/1/38	50,520,000	45,715,000	4,865,750	Water rates
Series 2024 Full Faith & Credit	5.00	5/21/24	6/1/49	14,400,000	14,115,000	1,020,750	Sewer rates
<b>Total Full Faith &amp; Credit Bonds</b>				<u>\$204,545,000</u>	<u>\$166,995,000</u>	<u>\$16,229,538</u>	

(1) Interest rates represent the rates on the remaining bond principal outstanding.

Schedule of Future Principal & Interest Payments due			
Fiscal year ended	Principal payable	Interest payable	Estimated Total
June 30, 2026	9,155,000	7,074,538	16,229,538
June 30, 2027	9,650,000	6,611,162	16,261,162
June 30, 2028	10,155,000	6,123,038	16,278,038
June 30, 2029	10,315,000	5,650,887	15,965,887
June 30, 2030	10,775,000	5,215,162	15,990,162
June 30, 2031	11,250,000	4,758,937	16,008,937
June 30, 2032	11,760,000	4,280,838	16,040,838
June 30, 2033	12,280,000	3,796,000	16,076,000
June 30, 2034	12,805,000	3,305,213	16,110,213
June 30, 2035	13,340,000	2,790,937	16,130,937
June 30, 2036	8,250,000	2,309,263	10,559,263
June 30, 2037	8,640,000	1,957,812	10,597,812
June 30, 2038	9,040,000	1,586,253	10,626,253
June 30, 2039	4,595,000	1,195,059	5,790,059
June 30, 2040	4,005,000	1,025,218	5,030,218
June 30, 2041	4,195,000	867,331	5,062,331
June 30, 2042	4,400,000	701,181	5,101,181
June 30, 2043	4,615,000	526,438	5,141,438
June 30, 2044	2,000,000	388,500	2,388,500
June 30, 2045	2,140,000	288,500	2,428,500
June 30, 2046	840,000	181,500	1,021,500
June 30, 2047	885,000	139,500	1,024,500
June 30, 2048	930,000	95,250	1,025,250
June 30, 2049	975,000	48,750	1,023,750
	<u>\$166,995,000</u>	<u>\$60,917,267</u>	<u>\$227,912,267</u>

\*Series 2018 Debt Service payments includes refunded Surface Water (Stormwater) Series 2005 and Water Series 2007.

# Property Taxes

Property Taxes Proposed Fiscal Year 2025-26 Calculation	Inside L.O. School Dist.	Outside L.O. School Dist.	Total	
Prior year's actual assessed value, 2024-25	\$9,496,479,599	\$455,284,912	\$9,951,764,511	
Plus estimated increases in assessed value:				
General growth @ 3%	284,894,388	13,658,548	298,552,936	
Estimation for new construction	94,516,451	-	94,516,451	
Special urban renewal growth	-	-	-	
Less urban renewal agency's estimated excess assessed value over its frozen tax base	(683,233,726)	-	(683,233,726)	
2025-26 estimated assessed value	\$9,192,656,712	\$468,943,460	\$9,661,600,172	
Tax rate:				
Permanent tax rate authority (5.0353 / 4.5884)			Gross levy	Net Levy
Proposed tax rate levied	<u>4.9703</u>	4.5884	@ 100%	@ 94%
2025-26 permanent taxes levied	\$45,690,262	\$2,151,700	\$47,841,962	\$ 44,970,000
2025-26 bonded debt tax rate and bonded debt levy		<u>0.2303</u>	\$2,225,532	<u>2,092,000</u>
Total net levy (estimated current property taxes to be collected, excluding delinquencies)				<u>\$ 47,062,000</u>

Property Taxes Proposed Fiscal Year 2026-27 Calculation	Inside L.O. School Dist.	Outside L.O. School Dist.	Total	
Prior year's estimated assessed value, 2025-26	\$9,875,890,438	\$468,943,460	\$10,344,833,898	
Plus projected increases in assessed value:				
General growth @ 3%	296,276,713	14,068,304	310,345,017	
Projection for new construction	98,297,109	-	98,297,109	
Special urban renewal growth	-	-	-	
Less urban renewal agency's projected excess assessed value over its frozen tax base	(716,653,379)	-	(716,653,379)	
2026-27 projected assessed value	\$9,553,810,881	\$483,011,764	\$10,036,822,645	
Tax rate:				
Permanent tax rate authority (5.0353 / 4.5884)			Gross levy	Net Levy
Projected tax rate levied	<u>4.9703</u>	4.5884	@ 100%	@ 94%
2026-27 permanent taxes levied	\$47,485,305	\$2,216,251	\$49,701,556	\$ 46,710,000
2026-27 bonded debt tax rate and bonded debt levy		<u>0.2224</u>	\$2,231,915	<u>2,098,000</u>
Total net levy (projected current property taxes to be collected, excluding delinquencies)				<u>\$ 48,808,000</u>

Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/citymanager/annual-tax-and-fee-comparison>



*The purpose of the following summaries is to provide an overview of the City's resources and requirements for the current budget.*

**Adopted Budget 2025-27 Biennium**  
**Citywide Ending Fund Balances**  
**General Fund Summary**  
**General Revenue**

# Adopted Budget for the 2025-27 Biennium

RESOURCES						
Department Description	Beginning Balance	Revenue Budget	Total	Percent of Total	Personnel Services +	Materials & Services +
<b>GENERAL (1)</b>						
General * (Dept 100 and 190)	\$ 25,486,462	\$ 5,582,000	\$ 31,068,462		\$ -	\$ -
Police	1,902,441	40,176,000	42,078,441		31,970,000	8,561,000
Fire	767,742	33,055,000	33,822,742		28,046,000	4,323,000
Parks & Recreation	2,968,051	32,993,000	35,961,051		18,071,000	12,812,000
Library	3,440,867	12,244,000	15,684,867		8,498,000	3,596,000
Planning	819,872	9,485,000	10,304,872		5,679,000	4,055,000
Adult Community Center	593,074	3,575,000	4,168,074		2,210,000	1,537,000
Municipal Court	499,614	2,716,000	3,215,614		1,042,000	1,971,000
Redevelopment	101,083	1,090,000	1,191,083		506,000	627,000
City Council	2,855	676,000	678,855		56,000	604,000
Information Technology	368,637	6,155,000	6,523,637		3,787,000	1,932,000
Finance	401,779	5,449,000	5,850,779		4,410,000	1,139,000
City Manager's Office	381,897	4,284,000	4,665,897		3,605,000	760,000
Facilities Management	1,264,711	2,062,000	3,326,711		1,215,000	1,311,000
City Attorney's Office	543,573	1,680,000	2,223,573		1,918,000	102,000
Human Resources	383,027	1,855,000	2,238,027		1,303,000	732,000
Risk Management	186,302	3,718,000	3,904,302		-	3,718,000
<b>Total General</b>	<b>40,111,987</b>	<b>166,795,000</b>	<b>206,906,987</b>	<b>44.8%</b>	<b>112,316,000</b>	<b>47,780,000</b>
<b>PUBLIC WORKS</b>						
Water *	15,032,486	35,208,000	50,240,486	10.9%	6,415,000	15,800,000
Sewer *	20,422,705	39,611,000	60,033,705	13.0%	1,866,000	17,951,000
Street *	14,042,712	25,356,000	39,398,712	8.5%	2,090,000	8,981,000
Stormwater *	7,896,768	11,607,000	19,503,768	4.2%	1,788,000	4,647,000
Public Works Support Services	583,415	5,448,000	6,031,415	1.3%	3,503,000	1,893,000
Systems Development Charges (SDC)	14,902,199	3,758,000	18,660,199	4.0%	-	-
Assessment Project	1,050,167	98,000	1,148,167	0.2%	-	-
Bicycle Path	409,924	77,000	486,924	0.1%	-	-
<b>Total Public Works</b>	<b>74,340,376</b>	<b>121,163,000</b>	<b>195,503,376</b>	<b>42.3%</b>	<b>15,662,000</b>	<b>49,272,000</b>
<b>OTHER</b>						
City/LORA Debt Service	-	7,216,000	7,216,000	1.6%	-	-
Engineering	1,602,638	11,069,000	12,671,638	2.7%	9,769,000	2,399,000
Building	6,940,018	5,392,000	12,332,018	2.7%	3,632,000	2,731,000
Bonded Debt Service	765,428	4,320,000	5,085,428	1.1%	-	-
Tennis Facility	171,216	1,081,000	1,252,216	0.3%	494,000	534,000
Tourism	295,585	656,000	951,585	0.2%	-	180,000
Trolley	595,429	230,000	825,429	0.2%	-	280,000
Public Art	68,311	418,000	486,311	0.1%	-	434,000
ACC Endowment	2,667,622	130,000	2,797,622	0.6%	-	-
Library Endowments	5,711,378	210,000	5,921,378	1.3%	-	-
Capital Reserve (2)	782,665	1,240,000	2,022,665	0.4%	-	-
Capital Reserve Water (3)	5,409,321	2,280,000	7,689,321	1.7%	-	-
<b>Total Other</b>	<b>25,009,611</b>	<b>34,242,000</b>	<b>59,251,611</b>	<b>12.8%</b>	<b>13,895,000</b>	<b>6,558,000</b>
<b>Total</b>	<b>\$ 139,461,974</b>	<b>\$ 322,200,000</b>	<b>\$ 461,661,974</b>	<b>100.0%</b>	<b>\$ 141,873,000</b>	<b>\$ 103,610,000</b>

**Budget Notes:**

- 1) General Fund revenue reflects Internal Charges for Services from departments within the General Fund as well as those charged to departments outside the General Fund.

# Adopted Budget for the 2025-27 Biennium

REQUIREMENTS										
Debt	Service	Transfers+	Capital Outlay	Expense	Budget	Department Contingency	Contingency	Ending Balance / Reserve for Future	Total	Change in Balances
\$	-	\$ 7,240,000	\$ -	\$ 7,240,000	\$ -	\$ -	\$ 11,749,000	\$ 12,079,462	\$ 31,068,462	\$ (614,000)
-	-	-	510,000	41,041,000	-	1,037,441	-	-	42,078,441	(865,000)
-	-	-	425,000	32,794,000	-	1,028,742	-	-	33,822,742	261,000
-	-	-	3,550,000	34,433,000	-	1,528,051	-	-	35,961,051	(1,440,000)
-	-	-	720,000	12,814,000	-	2,870,867	-	-	15,684,867	(570,000)
-	-	-	-	9,734,000	-	570,872	-	-	10,304,872	(249,000)
-	-	-	-	3,747,000	-	421,074	-	-	4,168,074	(172,000)
-	-	-	-	3,013,000	-	202,614	-	-	3,215,614	(297,000)
-	-	-	-	1,133,000	-	58,083	-	-	1,191,083	(43,000)
-	-	-	-	660,000	-	18,855	-	-	678,855	16,000
-	-	-	195,000	5,914,000	-	609,637	-	-	6,523,637	241,000
-	-	-	-	5,549,000	-	301,779	-	-	5,850,779	(100,000)
-	-	-	-	4,365,000	-	300,897	-	-	4,665,897	(81,000)
-	-	-	-	2,526,000	-	800,711	-	-	3,326,711	(464,000)
-	-	-	-	2,020,000	-	203,573	-	-	2,223,573	(340,000)
-	-	-	-	2,035,000	-	203,027	-	-	2,238,027	(180,000)
-	-	-	-	3,718,000	-	186,302	-	-	3,904,302	-
-	-	7,240,000	5,400,000	172,736,000	-	10,342,525	11,749,000	12,079,462	206,906,987	(4,897,000)
10,430,000	2,000,000	-	6,945,000	41,590,000	-	-	8,650,486	-	50,240,486	(6,382,000)
13,257,000	-	-	2,357,000	35,431,000	-	-	24,602,705	-	60,033,705	4,180,000
1,596,000	-	-	18,655,000	31,322,000	-	-	8,076,712	-	39,398,712	(5,966,000)
-	-	-	6,240,000	12,675,000	-	-	6,828,768	-	19,503,768	(1,068,000)
-	-	-	172,000	5,568,000	-	-	463,415	-	6,031,415	(120,000)
-	-	-	8,500,000	8,500,000	-	-	10,160,199	-	18,660,199	(4,742,000)
-	-	-	-	-	-	-	-	1,148,167	1,148,167	98,000
-	-	-	-	-	-	-	-	486,924	486,924	77,000
25,283,000	2,000,000	-	42,869,000	135,086,000	-	-	58,782,285	1,635,091	195,503,376	(13,923,000)
7,216,000	-	-	-	7,216,000	-	-	-	-	7,216,000	-
-	-	-	-	12,168,000	-	-	503,638	-	12,671,638	(1,099,000)
-	-	-	116,000	6,479,000	-	-	545,000	5,308,018	12,332,018	(1,087,000)
4,270,000	-	-	-	4,270,000	-	-	-	815,428	5,085,428	50,000
-	-	-	-	1,028,000	-	-	224,216	-	1,252,216	53,000
-	436,000	-	-	616,000	-	-	335,585	-	951,585	40,000
-	-	-	-	280,000	-	-	545,429	-	825,429	(50,000)
-	-	-	24,000	458,000	-	-	-	28,311	486,311	(40,000)
-	150,000	-	-	150,000	-	-	-	2,647,622	2,797,622	(20,000)
-	68,000	-	-	68,000	-	-	-	5,853,378	5,921,378	142,000
-	-	-	1,200,000	1,200,000	-	-	-	822,665	2,022,665	40,000
-	-	-	-	-	-	-	-	7,689,321	7,689,321	2,280,000
11,486,000	654,000	-	1,340,000	33,933,000	-	-	2,153,868	23,164,743	59,251,611	309,000
\$ 36,769,000	\$ 9,894,000	\$ -	\$ 49,609,000	\$ 341,755,000	\$ -	\$ 10,342,525	\$ 72,685,153	\$ 36,879,296	\$ 461,661,974	\$ (18,511,000)

2) Capital Reserve Fund includes a reserve for library capital and general equipment.  
 3) Capital Reserve Water Fund includes a reserve for capital related to the Water Treatment Plant and intake facilities.

# Fund Balance

## WHAT IS FUND BALANCE?

A Fund Balance is a reflection of the net financial resources of a fund (asset minus liabilities) or dollars available to spend. If some of the funds' resources are not available to spend, this would be indicated by restricting or reserving a portion of fund balance

There are five types of fund balances under the Governmental Accounting Standards Board Statetement Number 54 (GASB 54):

- **Nonspendable** - portion of fund balance that cannot be spent due to form or legally/constrctually required to be maintained intact.
- **Restricted** - portion of fund balance on which constrains have been placed
- **Committed** - portion of fund balance that can only be used for specific purposes
- **Assigned** - portion of fund balance that is intended for a specific purpose
- **Unassigned** - portion of fund balance that do not fall in the above categories

## THE CITY'S FUND BALANCE POLICIES

Maintain the reserves, contingencies, and ending fund balances of the various operating funds at levels sufficient to protect the City's credit as well as its financial position from emergencies.

The following summarizes the City's Finance Policy No.1 in reserve levels and ending fund balances:

### General Fund:

- Contingency, 14% of operations, plus an amount for risk management
- Ending fund balance, 16% of operations

Note: No more than 25% of the general funds' reserves may be held in land at any one-time.

### Fund Contingencies

The Tennis, Street, Water, Sewer, and Stormwater funds shall each maintain general contingencies equal to at least 10% of their operational requirements.

The Systems Development Charges Fund shall maintain general contingencies equal to the net balance of the fund.

The Engineering Fund shall maintain general contingencies equal to at least 5% of operations.

The Public Works Support Services Fund shall maintain general contingencies of at least 3% of operations.

### Fund Balance

Order of spending fund balance: the City considers when both restricted and unrestricted fund balance is available for use, the City is to use restricted fund balance first, and then unrestricted fund balance as needed. When unrestricted fund balance is spent, the City will consider that committed amounts will be reduced first, followed by assigned amounts, and then unassigned amounts last.

**Additional information can be found at the following links:**

<https://www.ci.oswego.or.us/finance/fund-balancecontingencies-policies>

# Citywide Ending Fund Balances

	BN 2023-25 BUDGET	BN 2025-27 ADOPTED	BN25 to BN27 CHANGE
<b>General Fund</b>			
Restricted or Non-Spendable			
Tree Citation Reserve	\$ 615,576	\$ 436,628	\$ (178,948)
Commitments and Assignments			
30% of Operations Requirement	20,198,299	23,213,462	3,015,163
Risk Management Contingency	610,000	615,000	5,000
Department Balances	9,487,098	9,905,897	418,799
<b>Total General Fund</b>	<b>30,910,973</b>	<b>34,170,987</b>	<b>3,260,014</b>
Utility Funds, Engineering, Public Works	32,648,975	60,921,014	28,272,039
Park Bond Fund & Parks Rec Center Fund	1,301	-	(1,301)
ACC Endowment	2,384,810	2,647,622	262,812
Library Endowments	5,092,443	5,853,378	760,935
Building Fund	5,514,697	5,853,018	338,321
Capital Reserve Fund			
General Capital Reserve	184,125	322,665	138,540
Library Set Aside	500,000	500,000	-
Parks Facility Set-aside	-	-	-
Capital Reserve Water Fund	5,071,441	7,689,321	2,617,880
Other Funds*	1,489,133	1,948,969	459,836
<b>City Total</b>	<b>\$ 83,797,898</b>	<b>\$ 119,906,974</b>	<b>\$ 36,109,076</b>

\*Other Funds include Bonded Debt, Tennis, Golf, Trolley, Tourism, and Public Art.

## Notes

- 30% of Operations Requirement: Per Financial Policy, the City reserves 14% of the annual General Fund operating budget in Contingency, and 16% of the annual operating budget in Ending Fund Balance.
- Department Balances represent General Fund departments using or saving resources for one-time items or for future capital or operational needs.
- Available General Fund resources above policy minimum requirements were appropriated to Parks projects and the Street Fund.

# General Fund Summary

The General Fund is the general operating fund of the City and is used to account for most financial activity that is not accounted for in other, more specialized, funds. This fund's primary source of revenue is property taxes. It also receives certain intergovernmental revenues like lodging taxes, state cigarette and liquor taxes, franchise fees, sales and services for fire contracts and parks and recreation activities, as well as reimbursement of expenses incurred on behalf of the City's urban renewal agency. General Fund reserves, one gauge of a city's longer-term financial health, include a risk management contingency, general operating contingency, and unappropriated ending fund balance.

Lake Oswego's General Fund accounts for general government services such as police, fire, parks and recreation, planning, and library. Additionally, it includes the city administrative functions such as finance, human resources, city management, legal services informational technology, and facilities management.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources:</b>						
Beginning Fund Balances	\$ 31,036,692	\$ 32,952,746	\$ 34,519,973	\$ 40,111,987	\$ 40,111,987	\$ 40,111,987
Property Taxes	74,933,201	81,065,234	85,600,000	92,680,000	92,680,000	92,680,000
Franchise Fees	5,693,454	6,717,357	7,765,000	8,760,000	8,760,000	8,760,000
Intergovernmental	13,077,771	21,997,057	15,150,000	14,663,000	14,663,000	14,663,000
Licenses and Fees	3,670,492	5,230,738	4,365,000	5,192,000	5,192,000	5,192,000
Fines & Forfeitures	1,844,376	1,822,607	1,850,000	1,880,000	1,880,000	1,880,000
Sales & Services	10,929,645	11,003,179	13,562,000	17,352,000	17,352,000	17,352,000
Miscellaneous Revenues	3,179,819	2,060,415	1,687,000	2,218,000	2,218,000	2,218,000
Charges for Services	17,309,000	19,167,000	22,152,000	23,832,000	23,832,000	23,832,000
Transfers	654,387	148,624	2,016,000	214,000	214,000	214,000
Other Financing Sources	53,287	64,843	-	-	-	-
<b>Total Resources</b>	<b>\$ 162,382,124</b>	<b>\$ 182,229,800</b>	<b>\$ 188,666,973</b>	<b>\$ 206,902,987</b>	<b>\$ 206,902,987</b>	<b>\$ 206,902,987</b>
<b>Requirements:</b>						
Personnel Services	\$ 79,378,863	\$ 85,825,129	\$ 99,188,000	\$ 112,316,000	\$ 112,316,000	\$ 112,316,000
Materials & Services	33,026,930	37,843,590	43,338,000	47,780,000	47,780,000	47,780,000
Debt Service	70,959	17,285,060	-	-	-	-
Transfers to Other Funds	13,890,350	2,085,891	4,222,000	7,240,000	7,240,000	7,240,000
Capital Outlay	3,062,276	-	13,254,000	5,400,000	5,400,000	5,400,000
Contingency	-	-	17,888,674	22,087,525	22,087,525	22,087,525
Unappropriated End Balance	32,952,746	39,190,130	10,776,299	12,079,462	12,079,462	12,079,462
<b>Total Requirements</b>	<b>\$ 162,382,124</b>	<b>\$ 182,229,800</b>	<b>\$ 188,666,973</b>	<b>\$ 206,902,987</b>	<b>\$ 206,902,987</b>	<b>\$ 206,902,987</b>

## Highlights

- Beginning Balances include the General Fund reserves and department balances.
- Contingency includes the minimum 14% policy requirement, the departments' operating contingencies, an amount for risk management, and amounts restricted for tree citations and small unspent grant monies.

# General Revenue

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
Beginning Balance	\$ 21,732,920	\$ 19,998,356	\$ 21,422,299	\$ 25,486,462	\$ 25,486,462	\$ 25,486,462
Property Taxes	74,933,199	81,065,234	85,600,000	92,680,000	92,680,000	92,680,000
Franchise Fees	5,693,455	6,717,359	7,765,000	8,760,000	8,760,000	8,760,000
Intergovernmental	2,793,336	11,839,375	2,969,000	2,643,000	2,643,000	2,643,000
Licenses & Fees	1,306,060	1,804,119	1,915,000	2,232,000	2,232,000	2,232,000
Miscellaneous Revenues	2,191,779	294,542	650,000	1,280,000	1,280,000	1,280,000
General Revenue	(75,344,000)	(81,233,000)	(93,918,000)	(102,013,000)	(102,013,000)	(102,013,000)
Charges for Services	(3,400)	-	-	-	-	-
<b>Total Resources</b>	<b>\$ 33,303,349</b>	<b>\$ 40,485,985</b>	<b>\$ 26,403,299</b>	<b>\$ 31,068,462</b>	<b>\$ 31,068,462</b>	<b>\$ 31,068,462</b>

**Budget Notes**

- Property Taxes are based upon assessed value information from the counties and expected growth.
- Intergovernmental revenue includes State Revenue Sharing (liquor and cigarette taxes).
- General Revenue category above is a negative due to general revenue allocated out to various General Fund departments:

	Proposed 2025-27	Approved 2025-27	Adopted 2025-27
Police	\$ 34,987,000	\$ 34,987,000	\$ 34,987,000
Fire	27,565,000	27,565,000	27,565,000
Parks & Recreation	22,464,000	22,464,000	22,464,000
Planning	6,556,000	6,556,000	6,556,000
Library	4,132,000	4,132,000	4,132,000
ACC	2,579,000	2,579,000	2,579,000
Municipal Court	1,388,000	1,388,000	1,388,000
Redevelopment	545,000	545,000	545,000
City Manager's Office	871,000	871,000	871,000
City Council	676,000	676,000	676,000
Risk Management	250,000	250,000	250,000
<b>Total</b>	<b>\$102,013,000</b>	<b>\$102,013,000</b>	<b>\$102,013,000</b>

# Understanding Budget Pages

The header contains a link to the website.

**Library**

A brief description of the department or fund

The Lake Oswego Public Library operates out of 27,000 square feet and strives to offer the best service and collection possible in the limited space. The library provides access to over 260,000 holdings, with an annual circulation rate of around 800,000 items borrowed each year. Per capita, the average Lake Oswego resident borrows more than 18 items each year, one of the highest rates in the nation.

A summary of the budget which includes two years of actuals, last cycle's budget, and the next adopted budget.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 1,616,014	\$ 2,428,759	\$ 2,451,496	\$ 3,440,867	\$ 3,440,867	\$ 3,440,867
Department Revenues	6,640,327	7,112,208	7,461,000	8,044,000	8,044,000	8,044,000
General Revenues	3,279,000	3,509,000	3,818,000	4,132,000	4,132,000	4,132,000
Transfers	54,387	58,403	66,000	64,000	68,000	68,000
<b>Total Resources</b>	<b>\$ 11,589,728</b>	<b>\$ 13,108,370</b>	<b>\$ 13,796,496</b>	<b>\$ 15,680,867</b>	<b>\$ 15,684,867</b>	<b>\$ 15,684,867</b>
<b>Requirements</b>						
Personnel Services	\$ 6,111,030	\$ 6,452,302	\$ 7,654,000	\$ 8,498,000	\$ 8,498,000	\$ 8,498,000
Materials & Services	1,704,693	2,120,994	1,968,000	1,958,000	1,958,000	1,958,000
Internal Fees for Services	1,286,000	1,578,000	1,537,000	1,638,000	1,638,000	1,638,000
Transfers	5,350	-	2,000	-	-	-
Capital Outlay	53,896	-	-	720,000	720,000	720,000
Department Contingency	-	-	2,635,496	2,866,867	2,870,867	2,870,867
<b>Total Requirements</b>	<b>\$ 9,160,969</b>	<b>\$ 10,151,296</b>	<b>\$ 13,796,496</b>	<b>\$ 15,680,867</b>	<b>\$ 15,684,867</b>	<b>\$ 15,684,867</b>
<b>FTE</b>	<b>33.7</b>	<b>33.7</b>	<b>33.7</b>	<b>33.7</b>	<b>33.7</b>	<b>33.7</b>

FTE - Full Time Equivalent count

Key Performance Indicators	2021-22	2022-23	2023-24	2024-25 EST
Registered Borrowers	25,547	22,907	23,805	24,187
Total Circulation	780,227	764,978	796,705	793,000
Total Holds Filled	162,720	163,046	159,208	158,000
Total Reference Questions Answered	33,139	27,400	26,789	26,500
Total Library Program Attendance	16,485	24,319	23,164	23,500

Key Performance Indicators (KPI) are measures of how well a department or fund is performing overtime based on the listed criteria decided by the department head. It remains consistent every cycle unless noted.

Budget Notes are consistent budget cycle after cycle. Information such as funds sources, expense categories, and other useful information.

### Budget Notes

- Internal fees for service is the department's cost share for administrative support services.

### Adopted 2025-27

- Department revenues include the levy from the County Library District of about \$4 million, replacement fees, and donations.
- Capital outlay items include a library bookmobile and library hold lockers and/or book vending machines.
- Contingency funds may be dedicated for building maintenance and capital improvements as needed.



Find additional information on the website at this link: <https://www.ci.oswego.or.us/library>

Lake Oswego Adopted Budget 2025-27



## General Fund (Direct)

These are departments in the General Fund that provide a direct service to Lake Oswego citizens and customers. They generate some of their own revenue as well as receive a portion of general revenues, such as property taxes, to fund their operations.

**Police**

**Parks & Recreation**

**Fire**

**Library**

**Planning**

**Adult Community Center**

**Municipal Court**

**Redevelopment**

**City Council**

To better understand how to read the following budget pages, please go to [pg i-37](#) for more information.

For department/fund goals, please go to [pg 72](#).

# Police

The Lake Oswego Police Department (LOPD) is a full-service police force whose mission is to cultivate an exceptional quality of life for everyone in our community. The Police Department carries out its mission through a range of divisions with activities ranging from criminal investigations and traffic law enforcement to education programs and behavioral health specialty.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 1,170,832	\$ 1,128,731	\$ 1,224,594	\$ 1,902,441	\$ 1,902,441	\$ 1,902,441
Department Revenues	4,101,633	4,505,177	4,695,000	5,189,000	5,189,000	5,189,000
General Revenues	25,238,000	28,589,000	31,247,000	34,987,000	34,987,000	34,987,000
Proceeds Sale of Capital Assets	27,946	30,665	-	-	-	-
<b>Total Resources</b>	<b>\$ 30,538,411</b>	<b>\$ 34,253,573</b>	<b>\$ 37,166,594</b>	<b>\$ 42,078,441</b>	<b>\$ 42,078,441</b>	<b>\$ 42,078,441</b>
<b>Requirements</b>						
Personnel Services	\$ 23,548,985	\$ 26,155,003	\$ 28,876,000	\$ 31,970,000	\$ 31,970,000	\$ 31,970,000
Materials & Services	1,961,688	2,613,614	2,635,000	3,317,000	3,317,000	3,317,000
Internal Fees for Services	3,531,000	3,527,000	4,247,000	5,244,000	5,244,000	5,244,000
Capital Outlay	368,007	441,123	510,000	510,000	510,000	510,000
Department Contingency	-	-	898,594	1,037,441	1,037,441	1,037,441
<b>Total Requirements</b>	<b>\$ 29,409,680</b>	<b>\$ 32,736,740</b>	<b>\$ 37,166,594</b>	<b>\$ 42,078,441</b>	<b>\$ 42,078,441</b>	<b>\$ 42,078,441</b>
<b>FTE</b>	68.5	74.0	74.0	75.0	75.0	75.0

Key Performance Indicators	2021-22	2022-23	2023-24	2024-25 EST
Total Incident Calls	23,045	26,037	25,476	24,526
Part I Crimes*	771	669	504	654
Part II Crimes*	1,628	1,531	1,263	1,158
911 Calls Answered	22,697	22,970	21,642	21,446
Non-Emergency Calls	64,822	83,828	81,965	73,818

## Budget Notes

- Major Department Revenue includes contracts for dispatch services at approximately \$1,400,000, State 911 reimbursement approximately \$385,000, and citation revenue split with Municipal Court approximately \$200,000.
- Internal fees for service is the department's cost share for administrative support services.

## Adopted 2025-27

- Continued increases in Materials and Services due to servicing police and dispatch equipment to a heightened level as needed and at higher costs than previous years.
- Capital Outlay is for police vehicle replacements. Several vehicles coming due for replacement next biennium.
- Department Contingency includes personnel cost offsetting prior year due to planned increase in hiring and expected staff attrition. Remaining balance committed to "soft costs" for maintaining, repairing, and replacing police and dispatch equipment.
- FTE increase is for a Behavior Health Specialist funded with a grant from Clackamas County.

Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/police>

# Parks & Recreation

The Parks & Recreation department operates one of the most active parks and recreation programs in the Portland metropolitan area. It manages over 600 acres of developed park property and open space property and over 45 acres of recreation facilities. Some facilities include the tennis center, golf course, adult community center, water sports center and Lake Oswego recreation and aquatics center.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 819,858	\$ 3,163,781	\$ 3,679,564	\$ 2,968,051	\$ 2,968,051	\$ 2,968,051
Department Revenues	4,524,291	5,378,126	6,957,000	10,499,000	10,499,000	10,499,000
General Revenues	16,424,000	16,000,000	24,505,000	22,464,000	22,464,000	22,464,000
Internal Charges for Svcs	101,000	104,000	30,000	30,000	30,000	30,000
Transfers	-	-	1,800,000	-	-	-
Proceeds Sale of Capital Assets	23,171	34,178	-	-	-	-
<b>Total Resources</b>	<b>\$ 21,892,320</b>	<b>\$ 24,680,085</b>	<b>\$ 36,971,564</b>	<b>\$ 35,961,051</b>	<b>\$ 35,961,051</b>	<b>\$ 35,961,051</b>
<b>Requirements</b>						
Personnel Services	\$ 8,737,415	\$ 9,342,583	\$ 13,155,000	\$ 18,071,000	\$ 18,071,000	\$ 18,071,000
Materials & Services	5,802,499	7,167,992	7,562,000	9,380,000	9,380,000	9,380,000
Internal Fees for Services	2,160,000	2,393,000	2,939,000	3,432,000	3,432,000	3,432,000
Debt Service	70,959	-	-	-	-	-
Capital Outlay	1,957,666	953,553	12,509,000	3,550,000	3,550,000	3,550,000
Department Contingency	-	-	806,564	1,528,051	1,528,051	1,528,051
<b>Total Requirements</b>	<b>\$ 18,728,539</b>	<b>\$ 19,857,128</b>	<b>\$ 36,971,564</b>	<b>\$ 35,961,051</b>	<b>\$ 35,961,051</b>	<b>\$ 35,961,051</b>
<b>FTE</b>	42.4	44.4	66.3	86.0	86.0	86.0

Key Performance Indicators	2021-22	2022-23	2023-24	2024-25 EST
Number of participants in recreation activities, programs, and events	216,270	213,402	248,575	265,000
Adult recreation program cost recovery	79%	74%	80%	80%

## Budget Notes

- Department revenue includes recreation program fees and usage fees.
- Charges for services are for services provided to the tennis facility.
- Materials & Services include continuation of the Invasive Species Removal Program \$70,000; the Habitat Enhancement program \$250,000; classes and parks maintenance supplies; and costs for the concert series. Other programs include parks and open space maintenance, Swim Park, Teen Center, and other recreation programming.
- Internal fees for service is the department's cost share for administrative support services.

## Adopted 2025-27

- FTE and personnel cost increases are due to the addition of 16.7 FTE (nonbenefited positions) in conjunction with the opening of the Lake Oswego Recreation and Aquatics Center, transfer of 1 FTE of an Admin Support from Tennis, .5 FTE for Urban Forester, 1 FTE for a new Admin Support and a reduction of .5 FTE of a temporary position and an addition of 1 FTE for a Natural Resources and Stewardship coordinator. Find additional information on the website at this link: <https://www.ci.oswego.or.us/parksrec>
- Capital Outlay includes Willamette Greenway Trail Connection and West Waluga Park Connector.

# Fire

The Lake Oswego Fire Department provides emergency response to more than 50,000 citizens within the City of Lake Oswego and three adjoining contract districts (Lake Grove Rural Fire District, Riverdale/ Dunthorpe Fire District, and Alto Park Water District). Four fire stations are strategically located throughout Lake Oswego to provide rapid emergency service to citizens in need 24 hours a day.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 1,501,105	\$ 1,193,100	\$ 623,829	\$ 767,742	\$ 767,742	\$ 767,742
Department Revenues	5,517,091	5,587,339	5,820,000	5,490,000	5,490,000	5,490,000
General Revenues	20,767,000	23,300,000	25,326,000	27,565,000	27,565,000	27,565,000
Proceeds Sale of Capital Assets	5,570	-	-	-	-	-
<b>Total Resources</b>	<b>\$ 27,790,766</b>	<b>\$ 30,080,439</b>	<b>\$ 31,769,829</b>	<b>\$ 33,822,742</b>	<b>\$ 33,822,742</b>	<b>\$ 33,822,742</b>
<b>Requirements</b>						
Personnel Services	\$ 22,537,896	\$ 24,193,422	\$ 25,802,000	\$ 28,046,000	\$ 28,046,000	\$ 28,046,000
Materials & Services	2,361,063	2,156,847	2,091,000	2,153,000	2,153,000	2,153,000
Internal Fees for Services	1,616,000	1,845,000	1,943,000	2,170,000	2,170,000	2,170,000
Capital Outlay	82,707	921,504	60,000	425,000	425,000	425,000
Department Contingency	-	-	1,873,829	1,028,742	1,028,742	1,028,742
<b>Total Requirements</b>	<b>\$ 26,597,666</b>	<b>\$ 29,116,773</b>	<b>\$ 31,769,829</b>	<b>\$ 33,822,742</b>	<b>\$ 33,822,742</b>	<b>\$ 33,822,742</b>
<b>FTE</b>	<b>52.0</b>	<b>52.0</b>	<b>52.0</b>	<b>53.0</b>	<b>53.0</b>	<b>53.0</b>

Key Performance Indicators	2021-22	2022-23	2023-24	2024-25 EST
Fire Responses	123	118	126	138
Medical Responses	3,114	3,412	3,498	3,262
Other Incident Responses	1,412	1,622	1,564	1,658
Percent of priority medical incidents where total response time is 8 minutes or less	94.62%	92.00%	92.00%	92.00%

## Budget Notes

- Department revenue includes fire district contracts for Lake Grove, Riverdale, and Alto Park.
- Internal fees for service is the department's cost share for administrative support services.

## Adopted 2025-27

- Materials and Services: \$32,000 is reserved for the Mobile Emergency Responder Radio Coverage (MERRC) Program
- Capital Outlay is for the vehicle replacement for the Fire Marshal and the brush rig.
- FTE increase is for a State grant funded senior living paramedic position.
- Contingency is set aside for future engine purchase.



Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/fire>

The Lake Oswego Public Library operates out of 27,000 square feet and strives to offer the best service and collection possible in the limited space. The library provides access to over 260,000 holdings, with an annual circulation rate of around 800,000 items borrowed each year. Per capita, the average Lake Oswego resident borrows more than 18 items each year, one of the highest rates in the nation.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 1,616,014	\$ 2,428,759	\$ 2,451,496	\$ 3,440,867	\$ 3,440,867	\$ 3,440,867
Department Revenues	6,640,327	7,112,208	7,461,000	8,044,000	8,044,000	8,044,000
General Revenues	3,279,000	3,509,000	3,818,000	4,132,000	4,132,000	4,132,000
Transfers	54,387	58,403	66,000	64,000	68,000	68,000
<b>Total Resources</b>	<b>\$ 11,589,728</b>	<b>\$ 13,108,370</b>	<b>\$ 13,796,496</b>	<b>\$ 15,680,867</b>	<b>\$ 15,684,867</b>	<b>\$ 15,684,867</b>
<b>Requirements</b>						
Personnel Services	\$ 6,111,030	\$ 6,452,302	\$ 7,654,000	\$ 8,498,000	\$ 8,498,000	\$ 8,498,000
Materials & Services	1,704,693	2,120,994	1,968,000	1,958,000	1,958,000	1,958,000
Internal Fees for Services	1,286,000	1,578,000	1,537,000	1,638,000	1,638,000	1,638,000
Transfers	5,350	-	2,000	-	-	-
Capital Outlay	53,896	-	-	720,000	720,000	720,000
Department Contingency	-	-	2,635,496	2,866,867	2,870,867	2,870,867
<b>Total Requirements</b>	<b>\$ 9,160,969</b>	<b>\$ 10,151,296</b>	<b>\$ 13,796,496</b>	<b>\$ 15,680,867</b>	<b>\$ 15,684,867</b>	<b>\$ 15,684,867</b>
<b>FTE</b>	<b>33.7</b>	<b>33.7</b>	<b>33.7</b>	<b>33.7</b>	<b>33.7</b>	<b>33.7</b>

Key Performance Indicators	2021-22	2022-23	2023-24	2024-25 EST
Registered Borrowers	25,547	22,907	23,805	24,187
Total Circulation	780,227	764,978	796,705	793,000
Total Holds Filled	162,720	163,046	159,208	158,000
Total Reference Questions Answered	33,139	27,400	26,789	26,500
Total Library Program Attendance	16,485	24,319	23,164	23,500

### Budget Notes

- Internal fees for service is the department's cost share for administrative support services.

### Adopted 2025-27

- Department revenues include the levy from the County Library District of about \$4 million, replacement fees, and donations.
- Capital outlay items include a library bookmobile and library hold lockers and/or book vending machines.
- Contingency funds may be dedicated for building maintenance and capital improvements as needed.



Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/library>

# Planning

Planning involves the consideration and balancing of many different factors and issues to make the best land use and growth management decisions for the community both for the short and long term. The department has three functional areas: Long Range Planning, Development Review, and Code Enforcement.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 1,418,529	\$ 1,341,798	\$ 1,196,124	\$ 819,872	\$ 819,872	\$ 819,872
Department Revenues	1,406,921	1,394,378	1,562,000	2,929,000	2,929,000	2,929,000
General Revenues	5,398,000	5,398,000	5,398,000	6,556,000	6,556,000	6,556,000
<b>Total Resources</b>	<b>\$ 8,223,450</b>	<b>\$ 8,134,176</b>	<b>\$ 8,156,124</b>	<b>\$ 10,304,872</b>	<b>\$ 10,304,872</b>	<b>\$ 10,304,872</b>
<b>Requirements</b>						
Personnel Services	\$ 3,953,829	\$ 4,426,040	\$ 5,188,000	\$ 5,679,000	\$ 5,679,000	\$ 5,679,000
Materials & Services	970,823	799,431	894,000	2,145,000	2,145,000	2,145,000
Internal Fees for Services	1,957,000	1,601,000	1,768,000	1,910,000	1,910,000	1,910,000
Department Contingency	-	-	306,124	570,872	570,872	570,872
<b>Total Requirements</b>	<b>\$ 6,881,652</b>	<b>\$ 6,826,471</b>	<b>\$ 8,156,124</b>	<b>\$ 10,304,872</b>	<b>\$ 10,304,872</b>	<b>\$ 10,304,872</b>
<b>FTE</b>	<b>14.5</b>	<b>15.5</b>	<b>15.7</b>	<b>15.6</b>	<b>15.6</b>	<b>15.6</b>

## Current Planning Key Performance Indicators

Indicators	2021-22	2022-23	2023-24	2024-25 EST
Land Use Applications Reviewed	79	61	41	40
Administrative Land Use Decisions within 4-6 week cycle	88%	90%	90%	100%
All Tree Removal Permits	2,205	1,547	1,550	1,524
-Type 2 Tree Apps	348	213	218	205
Annexations (Applications/Acres)	11/9.13	14/14.89	3/5.79	4/1.45
Pre-Applications	115	84	77	60

## Long Range Planning Key Performance Indicators

Long-range planning projects are developed based on Council goals, State mandates, regulatory updates, and Comprehensive Plan and Development Code maintenance. Due to their complexity, these projects take many months or even years to complete, making it challenging to report KPIs within a single fiscal year timeframe. Current planning staff assist with or lead some long-range projects depending on current planning workload. Below is a list of projects completed in the 2023-2024 timeframe and a list of projects the department will be working on in the 2025-2027 timeframe:

### 2023-2025

- Housing Needs Analysis and Housing Production Strategy (HPS), Citywide Parking Reform, SB 1537 - Applied for an Exemption for the City to the State Mandatory Adjustments for Housing, Urban and Community Forestry Plan Update, Annual Community Development Code Amendments
- Other Work Completed: an update to the City's Stormwater Code, establishment of a new recognized neighborhood association (Mary's Landing), and a Comprehensive Plan amendment relating to the proposed wastewater treatment plant. Staff also partially completed work to update the city's Flood Management Area standards, which is on hold pending further direction from FEMA.

### 2025-2027

- Foothills Framework Plan Update, Community Development Code Audit and Update, Tree Code Update, Implementation of near-term strategies in the HPS, Annual Community Development Code Amendments, Home Occupation Standards Amendments
- Other Work: completion of the Flood Management Area code amendments and possible code amendments that may be required in order for the City to qualify for an exemption to the state mandatory adjustments required by SB1537.

## Budget Notes

- Internal fees for service is the department's cost share for administrative support services.

### Adopted 2025-27

- Revenue and Materials and Services increased due to the following: a \$750,000 Metro grant for an update to the Foothills Framework Plan; an anticipated \$250,000 Metro grant for an audit and update of the City's Community Development Code; and a business license fee increase.
- Changes in FTE is due to a rounding adjustment of .1 of Admin Support II positions.

Find additional information on the website at this link:

<https://www.ci.oswego.or.us/planning>

# Adult Community Center

The Lake Oswego Adult Community Center (ACC), a division of the Parks and Recreation Department, is a nonprofit service and advocacy organization located in the First Addition Neighborhood in Lake Oswego. Generations of citizens in our community come to the Adult Community Center to have welcoming and transformational experiences. With programs and classes that meet various needs and staff who create positive experiences for all.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 184,446	\$ 383,885	\$ 507,829	\$ 593,074	\$ 593,074	\$ 593,074
Department Revenues	708,383	685,725	514,000	846,000	846,000	846,000
General Revenues	2,054,000	2,191,000	2,383,000	2,579,000	2,579,000	2,579,000
Transfers	600,000	90,220	150,000	150,000	150,000	150,000
<b>Total Resources</b>	<b>\$ 3,546,829</b>	<b>\$ 3,350,830</b>	<b>\$ 3,554,829</b>	<b>\$ 4,168,074</b>	<b>\$ 4,168,074</b>	<b>\$ 4,168,074</b>

<b>Requirements</b>						
Personnel Services	\$ 1,753,344	\$ 1,780,019	\$ 2,057,000	\$ 2,210,000	\$ 2,210,000	\$ 2,210,000
Materials & Services	459,600	536,648	526,000	1,011,000	1,011,000	1,011,000
Internal Fees for Services	350,000	372,000	460,000	526,000	526,000	526,000
Capital Outlay	600,000	-	-	-	-	-
Department Contingency	-	-	511,829	421,074	421,074	421,074
<b>Total Requirements</b>	<b>\$ 3,162,944</b>	<b>\$ 2,688,667</b>	<b>\$ 3,554,829</b>	<b>\$ 4,168,074</b>	<b>\$ 4,168,074</b>	<b>\$ 4,168,074</b>

<b>FTE</b>	8.6	8.6	8.3	8.3	8.3	8.3
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Key Performance Indicators	2021-22	2022-23	2023-24	2024-25 EST
Meals Served and Delivered	15,451	21,889	24,463	25,000

## Budget Notes

- Department revenue includes meals, network fees, program fees, donations, and County grants.
- Transfers are from the ACC Endowment Fund for allowed uses for center expenditures including program support and/or improvements.
- Internal fees for service is the department's cost share for administrative support services.



Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/acc>

# Municipal Court

The Municipal Court is the judicial branch of Lake Oswego city government. It has jurisdiction over all violations of city and state laws committed within city limits other than felonies. The court does not handle civil or small claims cases but does processes citations, reschedules arraignments, sets trials and maintains court records.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 479,481	\$ 572,411	\$ 629,081	\$ 499,614	\$ 499,614	\$ 499,614
Department Revenues	1,237,426	1,264,271	1,300,000	1,328,000	1,328,000	1,328,000
General Revenues	1,107,000	1,179,000	1,282,000	1,388,000	1,388,000	1,388,000
<b>Total Resources</b>	<b>\$ 2,823,907</b>	<b>\$ 3,015,682</b>	<b>\$ 3,211,081</b>	<b>\$ 3,215,614</b>	<b>\$ 3,215,614</b>	<b>\$ 3,215,614</b>
<b>Requirements</b>						
Personnel Services	\$ 775,649	\$ 758,181	\$ 930,000	\$ 1,042,000	\$ 1,042,000	\$ 1,042,000
Materials & Services	533,847	560,312	670,000	683,000	683,000	683,000
Internal Fees for Services	942,000	1,032,000	1,230,000	1,288,000	1,288,000	1,288,000
Department Contingency	-	-	381,081	202,614	202,614	202,614
<b>Total Requirements</b>	<b>\$ 2,251,496</b>	<b>\$ 2,350,493</b>	<b>\$ 3,211,081</b>	<b>\$ 3,215,614</b>	<b>\$ 3,215,614</b>	<b>\$ 3,215,614</b>
<b>FTE</b>	3.5	3.5	3.5	3.5	3.5	3.5

## Budget Notes

- Municipal Court fines revenue are divided 60/40 with the police department.
- Materials & Service is mostly comprised of fees and taxes paid to the Court, County, and State.
- Internal fees for service is the department's cost share for administrative support services.
- Contingency includes future equipment/furniture needs for the court office.



Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/municipalcourt>

# Redevelopment

The Lake Oswego Redevelopment Agency (LORA) manages urban renewal activities for the City, with initial focus on revitalization of a defined urban renewal district in the downtown area of Lake Oswego. Projects include public parks, trails and plazas, streetscape improvements, facade grants to improve existing commercial properties, and partnerships to facilitate and support private development of vibrant mixed-use projects.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 23,141	\$ 74,872	\$ 33,243	\$ 101,083	\$ 101,083	\$ 101,083
Department Revenues	1,204,260	1,219,000	608,000	545,000	545,000	545,000
General Revenues	-	-	608,000	545,000	545,000	545,000
<b>Total Resources</b>	<b>\$ 1,227,401</b>	<b>\$ 1,293,872</b>	<b>\$ 1,249,243</b>	<b>\$ 1,191,083</b>	<b>\$ 1,191,083</b>	<b>\$ 1,191,083</b>
<b>Requirements</b>						
Personnel Services	\$ 381,420	\$ 419,664	\$ 469,000	\$ 506,000	\$ 506,000	\$ 506,000
Materials & Services	6,109	4,878	22,000	22,000	22,000	22,000
Internal Fees for Services	765,000	830,000	725,000	605,000	605,000	605,000
Department Contingency	-	-	33,243	58,083	58,083	58,083
<b>Total Requirements</b>	<b>\$ 1,152,529</b>	<b>\$ 1,254,542</b>	<b>\$ 1,249,243</b>	<b>\$ 1,191,083</b>	<b>\$ 1,191,083</b>	<b>\$ 1,191,083</b>
<b>FTE</b>	1.3	1.3	1.3	1.3	1.3	1.3

## Budget Notes

- Department revenue is the reimbursement from the Lake Oswego Redevelopment Agency (LORA) to cover expenditures of this department including internal fees for service.
- General Revenues are to replace funds from the LORA East End District since it is nearing its maximum indebtedness.
- Internal fees for service is for the department's cost share for administrative support services.

Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/lora>

# City Council

The City Council is the governing body of the City of Lake Oswego, and the community elect members at large. Policy authority is given to a volunteer City Council and administrative authority for day-to-day operations in an appointed, professional City Manager.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 22,188	\$ 24,181	\$ 43,665	\$ 2,855	\$ 2,855	\$ 2,855
Department Revenues	-	2,400	-	-	-	-
General Revenues	261,000	399,000	452,000	676,000	676,000	676,000
<b>Total Resources</b>	<b>\$ 283,188</b>	<b>\$ 425,581</b>	<b>\$ 495,665</b>	<b>\$ 678,855</b>	<b>\$ 678,855</b>	<b>\$ 678,855</b>
<b>Requirements</b>						
Personnel Services	\$ 41,415	\$ 44,344	\$ 48,000	\$ 56,000	\$ 56,000	\$ 56,000
Materials & Services	217,592	376,288	425,000	604,000	604,000	604,000
Department Contingency	-	-	22,665	18,855	18,855	18,855
<b>Total Requirements</b>	<b>\$ 259,007</b>	<b>\$ 420,632</b>	<b>\$ 495,665</b>	<b>\$ 678,855</b>	<b>\$ 678,855</b>	<b>\$ 678,855</b>

## Budget Notes

- Major expenses in City Council materials & services include various memberships throughout the region, state, and nation. The largest expense is the \$160,000 in municipal grants for the biennium.
- Materials & Services also includes the Chamber Foundation Village Flower Baskets program, and Council administrative expenses.
- The community survey is typically conducted every other year at a cost of \$20,000.
- The City Council Goals can be found on their respective webpage.



Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/citycouncil>



## Public Works

Sewer

Water

Street

Stormwater

Systems Development Charges

Assessment Project

Bicycle Path

To better understand how to read the following budget pages, please go to **pg i-37** for more information.

For department/fund goals, please go to **pg 72**.

# Sewer

Public Works Maintenance operates and maintains 206 miles of collection system with 13 major pump stations and 14 single-family pump stations. All of these assets eventually flow into the Tryon Creek Wastewater Treatment Plant operated by the City of Portland on Foothills Road.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 21,162,217	\$ 21,013,046	\$ 24,946,332	\$ 20,422,705	\$ 20,422,705	\$ 20,422,705
Department Revenues	31,353,147	39,760,281	38,477,000	39,611,000	39,611,000	39,611,000
Proceeds from Bond Sale	25,492,360	-	16,500,000	-	-	-
Proceeds Sale of Capital Assets	59,387	24,604	-	-	-	-
<b>Total Resources</b>	<b>\$ 78,067,111</b>	<b>\$ 60,797,931</b>	<b>\$ 79,923,332</b>	<b>\$ 60,033,705</b>	<b>\$ 60,033,705</b>	<b>\$ 60,033,705</b>
<b>Requirements</b>						
Personnel Services	\$ 1,550,695	\$ 1,457,382	\$ 1,927,000	\$ 1,866,000	\$ 1,866,000	\$ 1,866,000
Materials & Services	11,279,024	11,086,007	18,274,000	13,619,000	13,619,000	13,619,000
Internal Fees for Services	2,959,000	3,462,000	4,283,000	4,332,000	4,332,000	4,332,000
Debt Service	36,768,377	11,249,025	12,354,000	13,257,000	13,257,000	13,257,000
Capital Outlay	4,496,969	15,065,195	32,400,000	2,357,000	2,357,000	2,357,000
Department Contingency	-	-	10,685,332	24,602,705	24,602,705	24,602,705
Unappropriated Ending Balance	21,013,046	18,478,322	-	-	-	-
<b>Total Requirements</b>	<b>\$ 78,067,111</b>	<b>\$ 60,797,931</b>	<b>\$ 79,923,332</b>	<b>\$ 60,033,705</b>	<b>\$ 60,033,705</b>	<b>\$ 60,033,705</b>
<b>FTE</b>	7.2	7.8	7.8	6.8	6.8	6.8

## Budget Notes

- Department revenue includes sewer fee revenue, utility penalties, SDC and line charges from the City of Portland, investment income, and zone of benefit fees.
- Materials and Services includes root cutting; line cleaning; and Fats, Oils and Grease (FO) program contracts; condition assessment; inflow/infiltration program analysis; utility rate analysis; and remittance to the City of Portland and Clean Water Services for sewer treatment.

## Adopted 2025-27

- Capital Outlay includes annual system wide rehabilitation work; scheduled repairs to the LOIS system; Cabana Lane manhole replacement; and pump replacements at existing lift stations.
- FTE change is due to the transfer of 1 FTE to the Street Fund.
- In October 2024, the City solicited Statements of Qualifications from qualified entities for designing, building, operating and maintaining (DBOM) the new wastewater treatment facility, the first step of a two-step procurement. Later this spring, the City intends to issue a Request for Proposals (RFP, step two) which will include pricing for designing and constructing the new facility as well as long term operations and maintenance. The proposed wastewater treatment facility is being funded by a combination of bonds, a loan from the Environmental Protection Agency (often referred to as a WIFIA loan), the City of Portland, System Development Charges, as well as utility revenue. The fiscal impact will be known at the completion of the RFP later this year. Construction is tentatively scheduled for completion by the end of 2028.

Find additional information on the website at this link:

<https://www.ci.oswego.or.us/publicworks/sewer>

The City of Lake Oswego operates and maintains a Water Treatment Plant in West Linn, as well as a distribution system, a water conservation program, and a cross connection control program. The Water Department’s mission is to bring healthy drinking water of the highest quality to Lake Oswego’s residential and wholesale customers from the intake facility on the Clackamas River in Gladstone, all the way to its citizen’s tap.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 15,001,195	\$ 15,468,159	\$ 13,337,068	\$ 15,032,486	\$ 15,032,486	\$ 15,032,486
Department Revenues	32,107,279	34,204,895	33,177,000	35,208,000	35,208,000	35,208,000
Transfers	-	2,000,000	-	-	-	-
Proceeds from Bond Sale	-	58,769,077	-	-	-	-
Proceeds Sale of Capital Assets	2,000	-	-	-	-	-
<b>Total Resources</b>	<b>\$ 47,110,474</b>	<b>\$ 110,442,131</b>	<b>\$ 46,514,068</b>	<b>\$ 50,240,486</b>	<b>\$ 50,240,486</b>	<b>\$ 50,240,486</b>
<b>Requirements</b>						
Personnel Services	\$ 5,201,225	\$ 5,260,504	\$ 5,559,000	\$ 6,415,000	\$ 6,415,000	\$ 6,415,000
Materials & Services	7,652,482	8,646,218	11,976,000	11,125,000	11,125,000	11,125,000
Internal Fees for Services	3,334,000	3,543,000	4,389,000	4,675,000	4,675,000	4,675,000
Debt Service	11,645,500	70,158,200	11,642,000	10,430,000	10,430,000	10,430,000
Transfers	-	3,000,000	2,000,000	2,000,000	2,000,000	2,000,000
Capital Outlay	3,809,109	2,903,605	9,385,000	6,945,000	6,945,000	6,945,000
Department Contingency	-	-	1,563,068	8,650,486	8,650,486	8,650,486
Unappropriated Ending Balance	15,468,158	16,930,604	-	-	-	-
<b>Total Requirements</b>	<b>\$ 47,110,474</b>	<b>\$ 110,442,131</b>	<b>\$ 46,514,068</b>	<b>\$ 50,240,486</b>	<b>\$ 50,240,486</b>	<b>\$ 50,240,486</b>
<b>FTE</b>	<b>19.9</b>	<b>21.2</b>	<b>19.3</b>	<b>19.3</b>	<b>19.3</b>	<b>19.3</b>

Key Performance Indicators	2021-22	2022-23	2023-24	2024-25 EST
Gallons of Drinking Water Produced	3.96 billion	4.0 billion	4.13 billion	4.19 billion
Percent of Water Quality Standards met or exceeded	100%	100%	100%	100%

## Budget Notes

- Department revenue includes consumer water sales, bulk water sales, utility penalties, meter installations, investment income, work order charges, sundry income, and Tigard's share of water production costs.
- Internal Fees for Service covers general administrative services, insurance, engineering services, operations support services, and maintenance services by Motor Pool.
- Material and Services include Annual Consumer Confidence Report; contract for membership in the Regional Water Providers Consortium and the Clackamas River Water Providers consortium; professional design services; water management and conservation plan updates; and utility rate analysis studies. The also includes the final stage of the Advance Metering Infrastructure (AMI) meter replacement project materials and installation costs.

## Adopted 2025-27

- Capital Outlay includes McVey Pump Station Replacement ; finish back up power at the Water Treatment Plant; Monroe and McNary Regulatory Water Vault; Reservoir Hatch Replacements; Water Valve Replacements; Cornell Water Main Upgrade; start the Bergis Reservoir Replacement; and Water Reservoir Painting and purchase of a replacement pickup truck and a hydro-excavator that is used for water main breaks and repair work.

Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/publicworks/water>

# Street

The Lake Oswego street system includes more than 181 miles of streets and 23.7 miles of pedestrian pathways. The streets are classified as major and minor arterials, major collectors, neighborhood collectors and local residential streets.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 2,119,641	\$ 7,667,709	\$ 12,681,670	\$ 14,042,712	\$ 14,042,712	\$ 14,042,712
Department Revenues	13,340,026	14,417,790	18,194,000	19,356,000	19,356,000	19,356,000
Transfer from General Fund	6,000,000	12,875,060	4,000,000	6,000,000	6,000,000	6,000,000
Proceeds from Bond Sale	12,523,141	-	-	-	-	-
Proceeds Sale of Capital Assets	24,650	12,888	-	-	-	-
<b>Total Resources</b>	<b>\$ 34,007,458</b>	<b>\$ 34,973,447</b>	<b>\$ 34,875,670</b>	<b>\$ 39,398,712</b>	<b>\$ 39,398,712</b>	<b>\$ 39,398,712</b>
<b>Requirements</b>						
Personnel Services	\$ 1,026,936	\$ 1,035,495	\$ 1,101,000	\$ 2,090,000	\$ 2,090,000	\$ 2,090,000
Materials & Services	3,465,313	2,824,680	3,712,000	4,201,000	4,201,000	4,201,000
Internal Fees for Services	3,302,000	3,610,000	4,051,000	4,780,000	4,780,000	4,780,000
Debt Service	1,254,178	1,593,150	1,593,000	1,596,000	1,596,000	1,596,000
Capital Outlay	17,291,322	15,210,177	19,055,000	17,655,000	18,655,000	18,655,000
Department Contingency	-	-	5,363,670	9,076,712	8,076,712	8,076,712
Unappropriated Ending Balance	7,667,709	10,699,945	-	-	-	-
<b>Total Requirements</b>	<b>\$ 34,007,458</b>	<b>\$ 34,973,447</b>	<b>\$ 34,875,670</b>	<b>\$ 39,398,712</b>	<b>\$ 39,398,712</b>	<b>\$ 39,398,712</b>
<b>FTE</b>	4.0	4.5	4.0	6.5	6.5	6.5

Key Performance Indicators	2016-17	2019-20	2022-23
Pavement Condition Index - every 3 years	68	69	75

NOTE: the change between proposed and adopted is due to the inclusion of McEwan pathway for \$1,000,000.

## Budget Notes

- Department revenue includes the street maintenance fee, motor vehicle fees and gas tax from State Revenue Sharing, investment income, insurance reimbursement, and sundry income.
- Internal Fees for Service covers general administrative services, insurance, engineering services, Public Works support services, and maintenance services by Motor Pool.
- Materials & Services includes sidewalk repairs, proactive right-of-way tree maintenance and vegetation removal; street lighting repairs and replacement, electricity for traffic signals and street lights, garbage receptacle pickup; and signing and striping on roadways;

## Adopted 2025-27

- Capital Outlay include projects such as Lakeview Blvd road and drainage improvements; school zone flasher upgrades; All Roads Transportation Safety (ARTS) grant improvement to traffic signal heads; ADA curb ramp replacement; Blue Heron roadway and drainage improvement; annual pavement improvements throughout the city; and pathway projects for Carmen, Treetop, Meadowlark, and Pilkington also includes the purchase of a street sweeper to replace the 2014 equipment.
- Staffing changes include adding 2.0 FTE to make a complete Street Maintenance team of 6.0 FTE, plus an additional 0.5 FTE for an Urban Forester position shared with Parks Maintenance.

Find additional information on the website at this link:

<https://www.ci.oswego.or.us/publicworks/streets>

# Stormwater

Stormwater Management Utility plans, designs, constructs, maintains, administers all City Stormwater conveyances and facilities, and the regulations for its control, as well as establishes standards for design and construction.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 1,529,939	\$ 2,108,780	\$ 5,063,521	\$ 7,896,768	\$ 7,896,768	\$ 7,896,768
Department Revenues	7,993,078	9,191,920	10,512,000	11,607,000	11,607,000	11,607,000
Transfers	-	570,000	-	-	-	-
Proceeds Sale of Capital Assets	9,667	-	-	-	-	-
<b>Total Resources</b>	<b>\$ 9,532,684</b>	<b>\$ 11,870,700</b>	<b>\$ 15,575,521</b>	<b>\$ 19,503,768</b>	<b>\$ 19,503,768</b>	<b>\$ 19,503,768</b>
<b>Requirements</b>						
Personnel Services	\$ 884,037	\$ 889,562	\$ 1,023,000	\$ 1,788,000	\$ 1,788,000	\$ 1,788,000
Materials & Services	619,526	848,059	1,169,000	1,354,000	1,354,000	1,354,000
Internal Fees for Services	2,622,000	2,615,000	3,003,000	3,293,000	3,293,000	3,293,000
Debt Service	452,250	453,250	231,000	-	-	-
Capital Outlay	2,846,090	2,193,897	6,300,000	6,240,000	6,240,000	6,240,000
Department Contingency	-	-	3,849,521	6,828,768	6,828,768	6,828,768
Unappropriated Ending Balance	2,108,781	4,870,932	-	-	-	-
<b>Total Requirements</b>	<b>\$ 9,532,684</b>	<b>\$ 11,870,700</b>	<b>\$ 15,575,521</b>	<b>\$ 19,503,768</b>	<b>\$ 19,503,768</b>	<b>\$ 19,503,768</b>
<b>FTE</b>	<b>3.9</b>	<b>3.6</b>	<b>3.5</b>	<b>6.0</b>	<b>6.0</b>	<b>6.0</b>

## Budget Notes

- Department revenue includes the stormwater water fee, utility penalties, and investment income.
- Internal Fees for Service covers general administrative services, insurance, engineering services, operations support, services, electrician services and maintenance services by Motor Pool.
- Materials and Services includes services need to meet the State of Oregon’s MS4 permit requirements and the Total Maximum Daily Loads (TMDL) requirements, and other state and federal regulatory responsibilities, Includes the starting phase for a new stormwater master plan.

## Adopted 2025-27

- Capital Outlay includes Lakeview Blvd road and drainage improvements, UIC decommissioning; Redfern Ave drainage improvements; 5th/Lake Bay Court drainage improvements; and Blue Heron roadway and drainage improvements; also includes replacement of a pickup truck and a larger work truck with small crane for accessing manholes and storm system vaults.
- Staffing changes include adding FTE to make a complete Storm Maintenance team of 6.0 FTE. Total change is 2.5 FTE.



Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/publicworks/surface-water>

# System Development Charges

System development charges (SDC) are fees paid by new development to recover a portion of the cost of existing infrastructure and to help fund new infrastructure necessary to serve new development. Infrastructure includes streets, the water system, sanitary and storm sewers, and parks.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
<b>Beginning Balance</b>						
Parks & Recreation	\$ 6,403,529	\$ 5,523,270	\$ 8,085,733	\$ 241,500	\$ 241,500	\$ 241,500
Street	1,434,867	1,482,921	3,617,353	3,629,332	3,629,332	3,629,332
Water	2,539,020	3,418,337	4,225,383	5,574,613	5,574,613	5,574,613
Sewer	3,314,328	3,868,872	4,426,921	5,371,074	5,371,074	5,371,074
Stormwater	8,150	16,558	46,459	85,680	85,680	85,680
<b>Total Beginning Balances</b>	<b>13,699,894</b>	<b>14,309,958</b>	<b>20,401,849</b>	<b>14,902,199</b>	<b>14,902,199</b>	<b>14,902,199</b>
<b>Department Revenues</b>						
Parks & Recreation	2,372,042	2,707,101	950,000	1,058,000	1,058,000	1,058,000
Street	884,176	2,566,479	1,006,000	1,352,000	1,352,000	1,352,000
Water	879,317	1,066,200	602,000	850,000	850,000	850,000
Sewer	554,544	711,839	276,000	482,000	482,000	482,000
Stormwater	8,409	39,214	12,000	16,000	16,000	16,000
<b>Total Department Revenues</b>	<b>4,698,488</b>	<b>7,090,833</b>	<b>2,846,000</b>	<b>3,758,000</b>	<b>3,758,000</b>	<b>3,758,000</b>
<b>Total Resources</b>	<b>\$ 18,398,382</b>	<b>\$ 21,400,791</b>	<b>\$ 23,247,849</b>	<b>\$ 18,660,199</b>	<b>\$ 18,660,199</b>	<b>\$ 18,660,199</b>
<b>Requirements</b>						
<b>Materials and Services</b>						
Parks - Prof & Tech Svcs	\$ 26,357	\$ 6,136	\$ -	\$ -	\$ -	\$ -
<b>Total Materials and Services</b>	<b>26,357</b>	<b>6,136</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Capital Outlay</b>						
Parks Projects	3,225,944	66,506	8,900,000	-	-	-
Street Projects	836,121	428,309	3,000,000	3,000,000	3,000,000	3,000,000
Water Projects	-	-	-	5,500,000	5,500,000	5,500,000
<b>Total Capital Outlay</b>	<b>4,114,779</b>	<b>507,087</b>	<b>11,900,000</b>	<b>8,500,000</b>	<b>8,500,000</b>	<b>8,500,000</b>
<b>Contingency</b>						
Parks & Recreation	-	-	135,733	1,299,500	1,299,500	1,299,500
Street	-	-	1,623,353	1,981,332	1,981,332	1,981,332
Water	-	-	4,827,383	924,613	924,613	924,613
Sewer	-	-	4,702,921	5,853,074	5,853,074	5,853,074
Stormwater	-	-	58,459	101,680	101,680	101,680
<b>Total Contingency</b>	<b>-</b>	<b>-</b>	<b>11,347,849</b>	<b>10,160,199</b>	<b>10,160,199</b>	<b>10,160,199</b>
<b>Unappropriated Ending Balance</b>						
Parks & Recreation	5,523,270	8,157,729	-	-	-	-
Street	1,482,922	3,621,091	-	-	-	-
Water	3,418,337	4,484,538	-	-	-	-
Sewer	3,868,872	4,580,713	-	-	-	-
Stormwater	16,559	55,773	-	-	-	-
<b>Total Unappropriated Ending Balance</b>	<b>14,309,960</b>	<b>20,899,844</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total Requirements</b>	<b>\$ 18,424,739</b>	<b>\$ 21,406,931</b>	<b>\$ 23,247,849</b>	<b>\$ 18,660,199</b>	<b>\$ 18,660,199</b>	<b>\$ 18,660,199</b>

## Adopted 2025-27

- Capital Outlay is for school adjacent pathways and McVey pump station replacement.

Find additional information on the website at this link:

<https://www.ci.oswego.or.us/engineering/system-development-charges-sdc>

<https://www.ci.oswego.or.us/parksrec/park-system-development-charges-sdc>

Lake Oswego Adopted Budget 2025-27

# Assessment Project

This fund is related to sewer hookups and their financing.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 740,985	\$ 806,567	\$ 900,369	\$ 1,050,167	\$ 1,050,167	\$ 1,050,167
Department Revenues	65,582	111,504	78,000	98,000	98,000	98,000
<b>Total Resources</b>	<b>\$ 806,567</b>	<b>\$ 918,071</b>	<b>\$ 978,369</b>	<b>\$ 1,148,167</b>	<b>\$ 1,148,167</b>	<b>\$ 1,148,167</b>
<b>Requirements</b>						
Reserve for Future Expenditure	\$ -	\$ -	\$ 978,369	\$ 1,148,167	\$ 1,148,167	\$ 1,148,167
Unappropriated Ending Balance	806,567	918,071	-	-	-	-
<b>Total Requirements</b>	<b>\$ 806,567</b>	<b>\$ 918,071</b>	<b>\$ 978,369</b>	<b>\$ 1,148,167</b>	<b>\$ 1,148,167</b>	<b>\$ 1,148,167</b>

### Budget Notes

- Revenues are related to the City's financing of sewer hookups.

# Bicycle Path

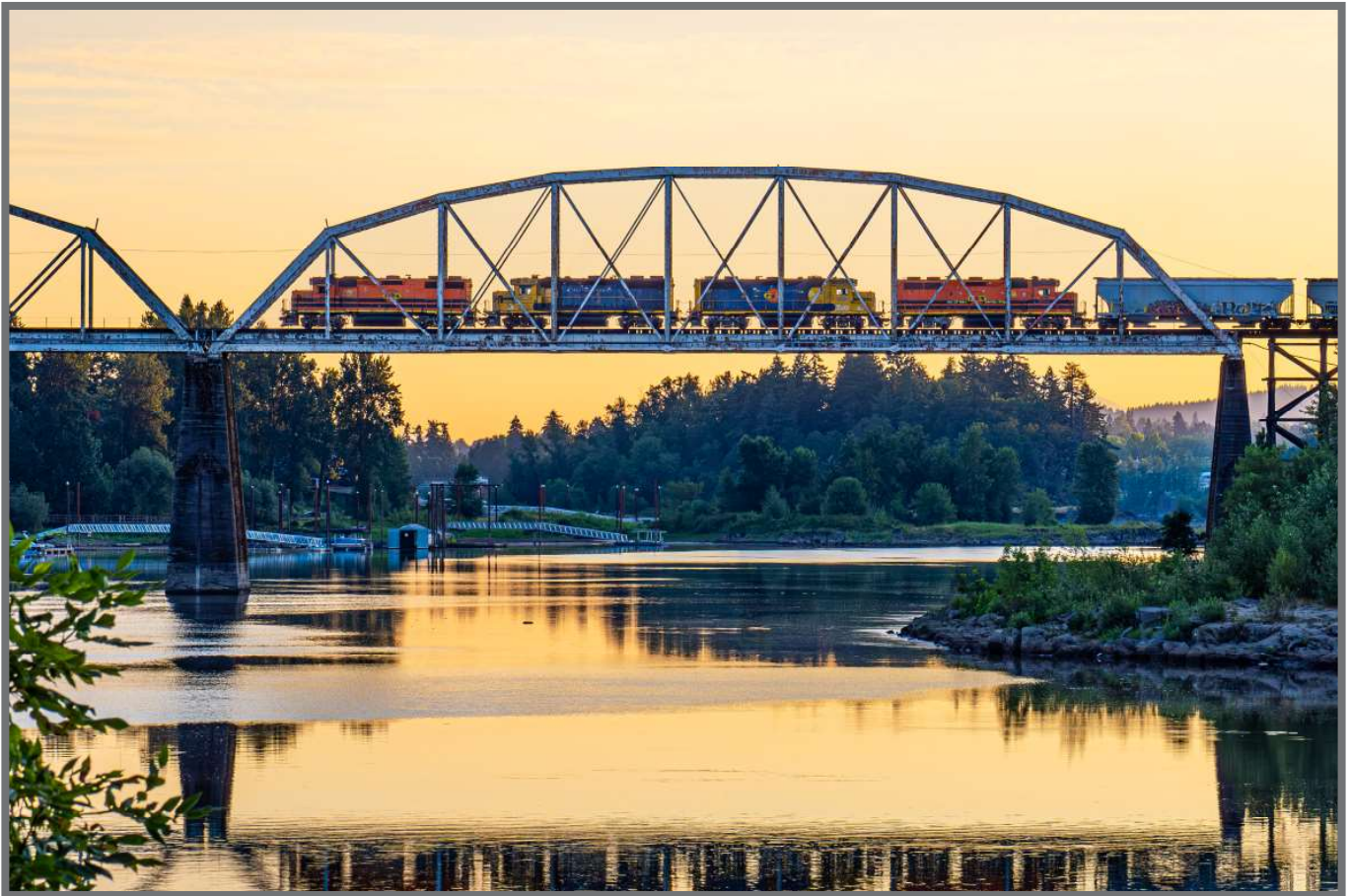
This fund is to track the City's highway fund state shared revenues to be used for bike paths.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 187,988	\$ 248,367	\$ 308,231	\$ 409,924	\$ 409,924	\$ 409,924
Department Revenues	60,379	67,461	58,000	77,000	77,000	77,000
<b>Total Resources</b>	<b>\$ 248,367</b>	<b>\$ 315,828</b>	<b>\$ 366,231</b>	<b>\$ 486,924</b>	<b>\$ 486,924</b>	<b>\$ 486,924</b>
<b>Requirements</b>						
Reserve for Future Expenditure	\$ -	\$ -	\$ 366,231	\$ 486,924	\$ 486,924	\$ 486,924
Unappropriated Ending Balance	248,367	315,828	-	-	-	-
<b>Total Requirements</b>	<b>\$ 248,367</b>	<b>\$ 315,828</b>	<b>\$ 366,231</b>	<b>\$ 486,924</b>	<b>\$ 486,924</b>	<b>\$ 486,924</b>

### Budget Notes

- Revenue comes from 1% of the City's highway fund state shared revenues.

Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/engineering/traffic-and-bikepedestrian-counts-program>





## Other Funds

Parks Recreation Center Fund  
Building  
Parks Bond Capital Project Fund  
City/LORA Debt Service  
Bonded Debt Service  
ACC Endowment  
Library Endowment  
Capital Reserve Water  
Capital Reserve  
Tennis Facility  
Trolley  
Tourism  
Public Art

To better understand how to read the following budget pages, please go to **pg i-37** for more information.

For department/fund goals, please go to **pg 72**.

# Parks Recreation Center Fund

This intergovernmental project, a collaborative effort with the Lake Oswego School District, is part of the 2019 bond project for a state-of-the-art recreation and aquatic center that includes a competitive pool, a recreational pool, weight, and cardio area, a gym that will equip all types of activities and league play, locker rooms, multi-purpose group fitness rooms to hold education and outreach programs, and host events, and office space for staff.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ -	\$ 1,402,469	\$ 144,520	\$ -	\$ -	\$ -
Department Revenues	-	1,818,237	16,700,000	-	-	-
Transfers	2,000,000	7,000,000	8,231,000	-	-	-
<b>Total Resources</b>	<b>\$ 2,000,000</b>	<b>\$ 10,220,706</b>	<b>\$ 25,075,520</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<b>Requirements</b>						
Capital Outlay	\$ 597,531	\$ 8,706,955	\$ 25,075,000	\$ -	\$ -	\$ -
Department Contingency	-	-	520	-	-	-
Unappropriated End Bal	1,402,469	1,513,751	-	-	-	-
<b>Total Requirements</b>	<b>\$ 2,000,000</b>	<b>\$ 10,220,706</b>	<b>\$ 25,075,520</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>

## Budget Notes

- Intergovernmental is funding from the Lake Oswego School District.
- Transfers are bond proceeds from the parks bonds capital project fund.
- Capital Outlay is for the LORAC.

## Adopted 2025-27

- All bond and Lake Oswego School District proceeds expended in previous biennium.



Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/parksrec/recreation-and-aquatics-center>

The building fund handles permits for individual, residential, and commercial needs. The City has joined the State of Oregon's full service e-permitting systems which allows for online applications, status updates, and to schedule inspections.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 4,527,812	\$ 5,089,830	\$ 5,885,697	\$ 6,940,018	\$ 6,940,018	\$ 6,940,018
Department Revenues	4,856,211	6,607,615	6,143,000	5,392,000	5,392,000	5,392,000
<b>Total Resources</b>	<b>\$ 9,384,023</b>	<b>\$ 11,697,445</b>	<b>\$ 12,028,697</b>	<b>\$ 12,332,018</b>	<b>\$ 12,332,018</b>	<b>\$ 12,332,018</b>
<b>Requirements</b>						
Personnel Services	\$ 2,270,384	\$ 2,322,896	\$ 3,408,000	\$ 3,632,000	\$ 3,632,000	\$ 3,632,000
Materials & Services	1,546,809	2,199,770	2,359,000	1,960,000	1,960,000	1,960,000
Internal Fees for Services	477,000	603,000	652,000	771,000	771,000	771,000
Capital Outlay	-	31,904	95,000	116,000	116,000	116,000
Department Contingency	-	-	545,000	545,000	545,000	545,000
Reserve for Future Expenditure	-	-	4,969,697	5,308,018	5,308,018	5,308,018
Unappropriated Ending Balance	5,089,830	6,539,875	-	-	-	-
<b>Total Requirements</b>	<b>\$ 9,384,023</b>	<b>\$ 11,697,445</b>	<b>\$ 12,028,697</b>	<b>\$ 12,332,018</b>	<b>\$ 12,332,018</b>	<b>\$ 12,332,018</b>
<b>FTE</b>	9.1	9.1	10.2	10.2	10.2	10.2

Key Performance Indicators	2021-22	2022-23	2023-24	2024-25 EST
New Single Family Homes	64	49	55	48
Total Residential Permits	3,410	2,750	2,872	2,153
Residential Permit Valuation	\$ 65,911,000	\$ 65,096,329	\$ 73,653,309	\$ 46,750,387
New Commercial Buildings	4	11	9	6
Total Commercial Permits	1,076	1,103	206	121
Commercial Permit Valuation	\$ 83,147,020	\$ 152,683,027	\$ 48,597,771	\$ 104,915,769

### Budget Notes

- Department revenue includes building permit and plan check fees and pass through amounts for State, Lake Oswego School District and Metro excise taxes.
- Per state law, Building Division revenue is a dedicated fund to support building permit, plan review, inspection services and expenses.

### Adopted 2025-27

- Capital outlay includes the purchase of three new fleet vehicles.
- Revenue is estimated to decrease as residential construction is slowing on new single family homes.

Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/building>

# Parks Bond Capital Project Fund

This fund tracks investment income and bond sale expenses.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ -	\$ 21,330,599	\$ 10,659,781	\$ -	\$ -	\$ -
Department Revenues	433,540	55,121	714,000	-	-	-
Proceeds from Bond Sale	25,220,212	6,351,839	-	-	-	-
<b>Total Resources</b>	<b>\$ 25,653,752</b>	<b>\$ 27,737,559</b>	<b>\$ 11,373,781</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<b>Requirements</b>						
Materials & Services	\$ 210,988	\$ 191,893	\$ -	\$ -	\$ -	\$ -
Transfers	2,000,000	7,000,000	8,231,000	-	-	-
Capital Outlay	2,112,165	10,369,937	3,142,000	-	-	-
Department Contingency	-	-	781	-	-	-
Unappropriated End Bal	21,330,599	10,175,729	-	-	-	-
<b>Total Requirements</b>	<b>\$ 25,653,752</b>	<b>\$ 27,737,559</b>	<b>\$ 11,373,781</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>

## Budget Notes

- Department revenue is for investment income.
- Materials & Services is for the bond sale expense.

## Adopted 2025-27

- All bond proceeds were expended in the previous biennium.

Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/parksrec/bond-investment>

## City/LORA Debt Service

This fund tracks debt payments from the Urban Renewal Agency to pay back the city.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Department Revenues	\$ 8,089,421	\$ 13,888,954	\$ 7,120,000	\$ 7,216,000	\$ 7,216,000	\$ 7,216,000
Proceeds from Bond Sale	16,803,890	-	-	-	-	-
<b>Total Resources</b>	<b>\$ 24,893,311</b>	<b>\$ 13,888,954</b>	<b>\$ 7,120,000</b>	<b>\$ 7,216,000</b>	<b>\$ 7,216,000</b>	<b>\$ 7,216,000</b>
<b>Requirements</b>						
Materials & Services	\$ 153,699	\$ -	\$ -	\$ -	\$ -	\$ -
Intergovernmental Expense	16,803,890	-	-	-	-	-
Debt Service	7,935,722	13,888,954	7,120,000	7,216,000	7,216,000	7,216,000
<b>Total Requirements</b>	<b>\$ 24,893,311</b>	<b>\$ 13,888,954</b>	<b>\$ 7,120,000</b>	<b>\$ 7,216,000</b>	<b>\$ 7,216,000</b>	<b>\$ 7,216,000</b>

### Budget Notes

- Department revenue is debt service payments from the Lake Oswego Redevelopment Agency for FF&C debt the City issued for LORA.
- Debt Service payments is the City paying these payments with funds from LORA

## Bonded Debt Service

This fund tracks debt service payments towards current General Obligation (GO) Bonds and revenues.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 991,827	\$ 1,069,029	\$ 878,772	\$ 765,428	\$ 765,428	\$ 765,428
Department Revenues	3,781,894	3,523,204	3,911,000	4,320,000	4,320,000	4,320,000
<b>Total Resources</b>	<b>\$ 4,773,721</b>	<b>\$ 4,592,233</b>	<b>\$ 4,789,772</b>	<b>\$ 5,085,428</b>	<b>\$ 5,085,428</b>	<b>\$ 5,085,428</b>
<b>Requirements</b>						
Debt Service	\$ 3,704,693	\$ 3,644,466	\$ 4,170,000	\$ 4,270,000	\$ 4,270,000	\$ 4,270,000
Unappropriated Ending Balance	1,069,028	947,767	619,772	815,428	815,428	815,428
<b>Total Requirements</b>	<b>\$ 4,773,721</b>	<b>\$ 4,592,233</b>	<b>\$ 4,789,772</b>	<b>\$ 5,085,428</b>	<b>\$ 5,085,428</b>	<b>\$ 5,085,428</b>

### Budget Notes

- Department revenue is property tax specifically allocated for General Obligation bonds.
- Debt Service is the annual principle and interest payments made on the City's outstanding General Obligation bonds.

Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/lora/lake-grove-urban-renewal-plan>  
<https://www.ci.oswego.or.us/finance/municipal-bonds-and-continuing-disclosure>

# ACC Endowment

This fund tracks funds that are restricted for a certain purpose.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 2,365,710	\$ 2,573,704	\$ 2,404,810	\$ 2,667,622	\$ 2,667,622	\$ 2,667,622
Department Revenues	807,994	7,847	130,000	130,000	130,000	130,000
<b>Total Resources</b>	<b>\$ 3,173,704</b>	<b>\$ 2,581,551</b>	<b>\$ 2,534,810</b>	<b>\$ 2,797,622</b>	<b>\$ 2,797,622</b>	<b>\$ 2,797,622</b>
<b>Requirements</b>						
Transfers	\$ 600,000	\$ 90,220	\$ 150,000	\$ 150,000	\$ 150,000	\$ 150,000
Reserve for Future Expenditure	-	-	2,384,810	2,647,622	2,647,622	2,647,622
Unappropriated Ending Balance	2,573,704	2,491,331	-	-	-	-
<b>Total Requirements</b>	<b>\$ 3,173,704</b>	<b>\$ 2,581,551</b>	<b>\$ 2,534,810</b>	<b>\$ 2,797,622</b>	<b>\$ 2,797,622</b>	<b>\$ 2,797,622</b>

### Budget Notes

- The Adult Community Center (ACC) endowment use is restricted for certain purposes.

# Library Endowment

This fund tracks funds that are restricted for a certain purpose.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 3,803,802	\$ 5,147,937	\$ 4,918,443	\$ 5,711,378	\$ 5,711,378	\$ 5,711,378
Department Revenues	1,398,522	22,872	240,000	200,000	210,000	210,000
Transfers	-	-	-	10,000	-	-
<b>Total Resources</b>	<b>\$ 5,202,324</b>	<b>\$ 5,170,809</b>	<b>\$ 5,158,443</b>	<b>\$ 5,921,378</b>	<b>\$ 5,921,378</b>	<b>\$ 5,921,378</b>
<b>Requirements</b>						
Transfers	\$ 54,387	\$ 58,403	\$ 66,000	\$ 68,000	\$ 68,000	\$ 68,000
Reserve for Future Expenditure	-	-	4,392,443	5,153,378	5,153,378	5,153,378
Unappropriated Ending Balance	5,147,937	5,112,406	700,000	700,000	700,000	700,000
<b>Total Requirements</b>	<b>\$ 5,202,324</b>	<b>\$ 5,170,809</b>	<b>\$ 5,158,443</b>	<b>\$ 5,921,378</b>	<b>\$ 5,921,378</b>	<b>\$ 5,921,378</b>

### Budget Notes

- The City has two library endowments. The funds can be used for certain purposes and are restricted.

Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/acc/about-adult-community-center>  
<https://www.ci.oswego.or.us/library/about-us>

# Capital Reserve Water

This fund tracks contributions toward future capital requirements of the water production system as agreed to under the LO-Tigard Water Partnership.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2023-25 PROPOSED	2023-25 APPROVED	2023-25 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ -	\$ -	\$ 3,001,441	\$ 5,409,321	\$ 5,409,321	\$ 5,409,321
Department Revenues	-	23,995	70,000	280,000	280,000	280,000
Transfers	-	3,000,000	2,000,000	2,000,000	2,000,000	2,000,000
<b>Total Resources</b>	<b>\$ -</b>	<b>\$ 3,023,995</b>	<b>\$ 5,071,441</b>	<b>\$ 7,689,321</b>	<b>\$ 7,689,321</b>	<b>\$ 7,689,321</b>
<b>Requirements</b>						
Reserve for Future Expenditure	\$ -	\$ -	\$ 5,071,441	\$ 7,689,321	\$ 7,689,321	\$ 7,689,321
Unappropriated Ending Balance	-	3,023,995	-	-	-	-
<b>Total Requirements</b>	<b>\$ -</b>	<b>\$ 3,023,995</b>	<b>\$ 5,071,441</b>	<b>\$ 7,689,321</b>	<b>\$ 7,689,321</b>	<b>\$ 7,689,321</b>

## Budget Notes

- Transfer are the City's contribution toward future Capital requirements of the water production system as agreed to under the LO-Tigard Water Partnership.

Find additional information on the website at this link:  
<http://www.lotigardwater.org/>

# Capital Reserve

This fund tracks reserves for future capital projects that don't have their own fund.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 2,065,509	\$ 3,071,975	\$ 2,444,125	\$ 782,665	\$ 782,665	\$ 782,665
Department Revenues	121,627	19,222	40,000	40,000	40,000	40,000
Transfers from General Fund	7,845,000	1,800,000	-	1,200,000	1,200,000	1,200,000
<b>Total Resources</b>	<b>\$ 10,032,136</b>	<b>\$ 4,891,197</b>	<b>\$ 2,484,125</b>	<b>\$ 2,022,665</b>	<b>\$ 2,022,665</b>	<b>\$ 2,022,665</b>
<b>Requirements</b>						
Materials & Services	\$ 4,192,701	\$ 295,044	\$ -	\$ -	\$ -	\$ -
Transfers	-	-	1,800,000	-	-	-
Capital Outlay	2,767,460	2,272,931	-	1,200,000	1,200,000	1,200,000
Reserve for Future Expenditure	-	-	684,125	822,665	822,665	822,665
Unappropriated End Bal	3,071,975	2,323,222	-	-	-	-
<b>Total Requirements</b>	<b>\$ 10,032,136</b>	<b>\$ 4,891,197</b>	<b>\$ 2,484,125</b>	<b>\$ 2,022,665</b>	<b>\$ 2,022,665</b>	<b>\$ 2,022,665</b>

## Budget Notes

- Reserve for Future Expenditure reflects \$500,000 set aside for the library.
- Transfer reflects \$1,200,000 for a fire engine.

# Tennis Facility

The Lake Oswego Indoor Tennis Center is a four-court facility open-year round to players of all ages and ability levels. The Tennis Center is open to both Lake Oswego residents and non-residents. Courts are open every day of the year for hourly rental. Throughout the year, Parks & Recreation offers tennis lessons for players of all abilities, ages five and up.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 782,709	\$ 373,401	\$ 176,554	\$ 171,216	\$ 171,216	\$ 171,216
Department Revenues	624,851	539,940	1,308,000	1,081,000	1,081,000	1,081,000
<b>Total Resources</b>	<b>\$ 1,407,560</b>	<b>\$ 913,341</b>	<b>\$ 1,484,554</b>	<b>\$ 1,252,216</b>	<b>\$ 1,252,216</b>	<b>\$ 1,252,216</b>
<b>Requirements</b>						
Personnel Services	\$ 397,486	\$ 263,843	\$ 871,000	\$ 494,000	\$ 494,000	\$ 494,000
Materials & Services	175,673	197,084	176,000	192,000	192,000	192,000
Internal Fees for Services	261,000	371,000	276,000	342,000	342,000	342,000
Capital Outlay	200,000	-	-	-	-	-
Department Contingency	-	-	161,554	224,216	224,216	224,216
Unappropriated Ending Balance	373,401	81,414	-	-	-	-
<b>Total Requirements</b>	<b>\$ 1,407,560</b>	<b>\$ 913,341</b>	<b>\$ 1,484,554</b>	<b>\$ 1,252,216</b>	<b>\$ 1,252,216</b>	<b>\$ 1,252,216</b>
<b>FTE</b>	<b>3.1</b>	<b>3.1</b>	<b>4.1</b>	<b>3.1</b>	<b>3.1</b>	<b>3.1</b>

Key Performance Indicators	2021-22	2022-23	2023-24	2024-25 EST
Tennis Center Cost Recovery	Closed	75%	114%	100%

## Budget Notes

### Adopted 2025-27

- FTE decrease is due to the transfer of one full time administrative support staff to Parks.



Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/parksrec/indoor-tennis-center>

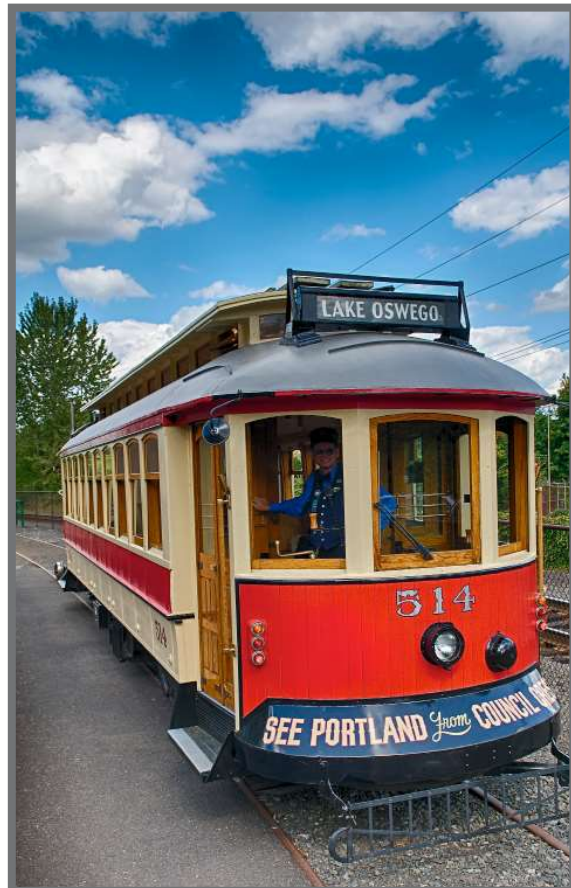
# Trolley

Learn about the Willamette Shore Line’s historic past while enjoying a relaxing ride along the shore of the Willamette River. This scenic 10.5-mile round-trip ride runs from Lake Oswego to Bancroft Street in SW Portland and features spectacular views plus several unique railroad attractions. Rides take about 90 minutes.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 473,652	\$ 492,447	\$ 494,602	\$ 595,429	\$ 595,429	\$ 595,429
Department Revenues	156,066	152,508	208,000	170,000	170,000	170,000
Transfers from General Fund	40,000	40,000	40,000	40,000	40,000	40,000
Transfers from Tourism Fund	20,000	20,000	20,000	20,000	20,000	20,000
<b>Total Resources</b>	<b>\$ 689,718</b>	<b>\$ 704,955</b>	<b>\$ 762,602</b>	<b>\$ 825,429</b>	<b>\$ 825,429</b>	<b>\$ 825,429</b>
<b>Requirements</b>						
Materials & Services	\$ 197,271	\$ 141,851	\$ 375,000	\$ 280,000	\$ 280,000	\$ 280,000
Department Contingency	-	-	387,602	545,429	545,429	545,429
Unappropriated Ending Balance	492,447	563,104	-	-	-	-
<b>Total Requirements</b>	<b>\$ 689,718</b>	<b>\$ 704,955</b>	<b>\$ 762,602</b>	<b>\$ 825,429</b>	<b>\$ 825,429</b>	<b>\$ 825,429</b>

## Budget Notes

- Materials and Services includes rail line maintenance.



Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/community/willamette-shore-trolley>

This fund tracks a portion of the City’s local lodging taxes. These tax dollars can be used for the promotion and development of tourism and visitor programs for Lake Oswego.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 236,075	\$ 60,173	\$ 80,250	\$ 295,585	\$ 295,585	\$ 295,585
Department Revenues	366,586	545,186	548,000	656,000	656,000	656,000
<b>Total Resources</b>	<b>\$ 602,661</b>	<b>\$ 605,359</b>	<b>\$ 628,250</b>	<b>\$ 951,585</b>	<b>\$ 951,585</b>	<b>\$ 951,585</b>
<b>Requirements</b>						
Materials & Services	\$ 58,858	\$ 70,732	\$ 88,000	\$ 180,000	\$ 180,000	\$ 180,000
Transfers	280,000	385,000	352,000	436,000	436,000	436,000
Capital Outlay	203,630	25,000	-	-	-	-
Department Contingency	-	-	188,250	335,585	335,585	335,585
Unappropriated Ending Balance	60,173	124,627	-	-	-	-
<b>Total Requirements</b>	<b>\$ 602,661</b>	<b>\$ 605,359</b>	<b>\$ 628,250</b>	<b>\$ 951,585</b>	<b>\$ 951,585</b>	<b>\$ 951,585</b>

### Budget Notes

- The Tourism Fund's department revenue comes from approximately 23% of the City's Local Lodging Taxes.
- Materials & Services includes the City's contribution to the Festival of the Arts for \$45,000 annually and \$50,000 for "promote Lake Oswego as a destination".
- Included in transfers is a transfer to Public Art Fund for the City's contract with the Lake Oswego Arts Council and to the Trolley Fund for the Willamette Shoreline Trolley.

Find additional information on the website at this link:  
[https://www.ci.oswego.or.us/boc\\_tac](https://www.ci.oswego.or.us/boc_tac)

# Public Art

This fund pays for the administration and maintenance of the City’s Gallery Without Walls program and new art.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 57,679	\$ 326,802	\$ 105,955	\$ 68,311	\$ 68,311	\$ 68,311
Department Revenues	434,358	32,714	2,000	2,000	2,000	2,000
Transfers	260,000	365,000	512,000	416,000	416,000	416,000
<b>Total Resources</b>	<b>\$ 752,037</b>	<b>\$ 724,516</b>	<b>\$ 619,955</b>	<b>\$ 486,311</b>	<b>\$ 486,311</b>	<b>\$ 486,311</b>
<b>Requirements</b>						
Materials & Services	\$ 371,435	\$ 429,142	\$ 408,000	\$ 434,000	\$ 434,000	\$ 434,000
Capital Outlay	53,800	196,540	144,000	24,000	24,000	24,000
Department Contingency	-	-	-	28,311	28,311	28,311
Reserve for Future Expenditure	-	-	67,955	-	-	-
Unappropriated End Bal	326,802	98,834	-	-	-	-
<b>Total Requirements</b>	<b>\$ 752,037</b>	<b>\$ 724,516</b>	<b>\$ 619,955</b>	<b>\$ 486,311</b>	<b>\$ 486,311</b>	<b>\$ 486,311</b>

## Budget Notes

- Transfers are from the Tourism Fund.
- Materials and Services is for the administration and maintenance of the City's gallery without walls program.
- Capital Outlay is for the purchase of public art, includes the annual people's choice.



Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/community/arts-culture>



## Support Service

Support service departments provide internal support and administrative functions to the City's direct service departments. Support services are reimbursed by internal fees for service.

## Engineering

## Public Works Support Services

## Information Technology

## Finance

## City Manager's Office

## Facilities Management

## City Attorney's Office

## Human Resources

## Risk Management

## General Nondepartmental

To better understand how to read the following budget pages, please go to **pg i-37** for more information.

For department/fund goals, please go to **pg 72**.

# Engineering

The core purpose of the fund is to provide quality engineering services consistent with environmental values, safety standards and the needs of the community. They are committed to excellence in infrastructure management, planning, design and construction.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 870,522	\$ 1,396,019	\$ 1,284,798	\$ 1,602,638	\$ 1,602,638	\$ 1,602,638
Department Revenues	549,216	671,877	509,000	519,000	519,000	519,000
Charges for Services	8,948,102	8,562,334	9,443,000	10,550,000	10,550,000	10,550,000
Proceeds Sale of Capital Assets	3,660	-	-	-	-	-
<b>Total Resources</b>	<b>\$ 10,371,500</b>	<b>\$ 10,630,230</b>	<b>\$ 11,236,798</b>	<b>\$ 12,671,638</b>	<b>\$ 12,671,638</b>	<b>\$ 12,671,638</b>
<b>Requirements</b>						
Personnel Services	\$ 7,174,782	\$ 7,071,346	\$ 8,277,000	\$ 9,769,000	\$ 9,769,000	\$ 9,769,000
Materials & Services	549,226	564,055	904,000	827,000	827,000	827,000
Internal Fees for Services	1,226,000	1,306,000	1,547,000	1,572,000	1,572,000	1,572,000
Capital Outlay	25,473	94,541	25,000	-	-	-
Department Contingency	-	-	483,798	503,638	503,638	503,638
Unappropriated Ending Balance	1,396,019	1,594,288	-	-	-	-
<b>Total Requirements</b>	<b>\$ 10,371,500</b>	<b>\$ 10,630,230</b>	<b>\$ 11,236,798</b>	<b>\$ 12,671,638</b>	<b>\$ 12,671,638</b>	<b>\$ 12,671,638</b>
<b>FTE</b>	25.3	25.8	24.8	26.7	26.7	26.7

## Budget Notes

- Department revenue includes engineering fees, erosion control fees, street opening permits, investment income, and sundry income.
- Internal Fees for Service covers general administrative services, insurance, and maintenance services by motor pool.
- Materials and Services includes annual software subscriptions, such as aerial photography update, regional parcel data update for LO MAPs, and miscellaneous design services or analysis need for small engineering issues that are not yet identified projects or are driven by emergency events.

## Adopted 2025-27

- Changes in personnel services are due to an addition of a Director of Special Projects moving from City Managers Office working on the new sewer plant, Engineering Tech III, and a rounding adjustment of .1 of Admin Support II positions.

Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/engineering>

# Public Works Support Services

This fund is responsible for maintaining infrastructure systems throughout the City to ensure they are working correctly, efficiently, and that the life of our assets is maximized. Streets, Water, Sewer, Stormwater, Motor Pool and City Beautification maintenance programs make up the department with each responsible for their own infrastructure system.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 734,346	\$ 751,708	\$ 1,106,137	\$ 583,415	\$ 583,415	\$ 583,415
Department Revenues	77,469	83,816	52,000	52,000	52,000	52,000
Internal Charges for Svcs	3,579,000	3,872,000	4,364,000	5,396,000	5,396,000	5,396,000
Proceeds Sale of Capital Assets	5,000	-	-	-	-	-
<b>Total Resources</b>	<b>\$ 4,395,815</b>	<b>\$ 4,707,524</b>	<b>\$ 5,522,137</b>	<b>\$ 6,031,415</b>	<b>\$ 6,031,415</b>	<b>\$ 6,031,415</b>
<b>Requirements</b>						
Personnel Services	\$ 2,168,987	\$ 2,098,239	\$ 3,445,000	\$ 3,503,000	\$ 3,503,000	\$ 3,503,000
Materials & Services	956,619	1,010,935	1,155,000	1,221,000	1,221,000	1,221,000
Internal Fees for Services	366,000	429,000	464,000	672,000	672,000	672,000
Capital Outlay	152,501	52,237	45,000	172,000	172,000	172,000
Department Contingency	-	-	413,137	463,415	463,415	463,415
Unappropriated Ending Balance	751,708	1,117,113	-	-	-	-
<b>Total Requirements</b>	<b>\$ 4,395,815</b>	<b>\$ 4,707,524</b>	<b>\$ 5,522,137</b>	<b>\$ 6,031,415</b>	<b>\$ 6,031,415</b>	<b>\$ 6,031,415</b>
<b>FTE</b>	<b>9.5</b>	<b>9.6</b>	<b>10.5</b>	<b>10.0</b>	<b>10.0</b>	<b>10.0</b>

## Budget Notes

- Department revenue includes fuel usage reimbursement from the Lake Oswego School District, investment income, and sundry income.
- Internal fees for service is the department's cost share for administrative support services.

## Adopted 2025-27

- FTE count decreased by .5 due to a reallocation of an electrician position.
- Capital Outlay is for replacement of two vehicles.

Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/publicworks>

# Information Technology

The Information Technology (IT) department supports everyone in the city. They have limited interactions with the public.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 415,634	\$ 714,816	\$ 393,537	\$ 368,637	\$ 368,637	\$ 368,637
Department Revenues	84,503	26,895	-	-	-	-
Internal Charges for Svcs	4,222,000	4,162,000	4,913,000	6,155,000	6,155,000	6,155,000
<b>Total Resources</b>	<b>\$ 4,722,137</b>	<b>\$ 4,903,711</b>	<b>\$ 5,306,537</b>	<b>\$ 6,523,637</b>	<b>\$ 6,523,637</b>	<b>\$ 6,523,637</b>
<b>Requirements</b>						
Personnel Services	\$ 2,679,843	\$ 3,068,492	\$ 3,434,000	\$ 3,787,000	\$ 3,787,000	\$ 3,787,000
Materials & Services	1,327,478	1,456,027	1,304,000	1,932,000	1,932,000	1,932,000
Capital Outlay	-	107,447	175,000	195,000	195,000	195,000
Department Contingency	-	-	393,537	609,637	609,637	609,637
<b>Total Requirements</b>	<b>\$ 4,007,321</b>	<b>\$ 4,631,966</b>	<b>\$ 5,306,537</b>	<b>\$ 6,523,637</b>	<b>\$ 6,523,637</b>	<b>\$ 6,523,637</b>
<b>FTE</b>	9.5	9.5	9.5	9.5	9.5	9.5

## Budget Notes

- Materials and Services includes all network hardware for data and voice, all computers and related equipment, common software maintenance, purchasing all plain and specialty paper, and costs associated with centralized printing in the Copy and Mail Center.
- The budget also includes the city telephone charges.

## Adopted 2025-27

- Materials & Services increase is due to cybersecurity improvements, general increase in software usage, and compliance with criminal justice information policy requirements
- Capital outlay is for replacement or expansion of server infrastructure and vehicle replacement

The Finance Department has the fiduciary responsibility to safeguard the City’s financial assets and manage them in accordance with generally accepted accounting and financial management principles. The department’s mission is to provide professional financial services to City Manager, Council, and City departments in order to promote fiscal stability and integrity.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 315,247	\$ 542,829	\$ 344,446	\$ 401,779	\$ 401,779	\$ 401,779
Department Revenues	831,414	925,420	280,000	280,000	280,000	280,000
Internal Charges for Svcs	3,044,000	3,177,000	4,472,000	5,169,000	5,169,000	5,169,000
<b>Total Resources</b>	<b>\$ 4,190,661</b>	<b>\$ 4,645,249</b>	<b>\$ 5,096,446</b>	<b>\$ 5,850,779</b>	<b>\$ 5,850,779</b>	<b>\$ 5,850,779</b>
<b>Requirements</b>						
Personnel Services	\$ 2,768,941	\$ 2,735,897	\$ 3,807,000	\$ 4,410,000	\$ 4,410,000	\$ 4,410,000
Materials & Services	878,891	857,384	945,000	1,139,000	1,139,000	1,139,000
Department Contingency	-	-	344,446	301,779	301,779	301,779
<b>Total Requirements</b>	<b>\$ 3,647,832</b>	<b>\$ 3,593,281</b>	<b>\$ 5,096,446</b>	<b>\$ 5,850,779</b>	<b>\$ 5,850,779</b>	<b>\$ 5,850,779</b>
<b>FTE</b>	10.5	10.5	12.5	13.0	13.0	13.0

Key Performance Indicators	2021-22	2022-23	2023-24	2024-25 EST
Passport Applications	2,320	2,237	2,441	2,450
Business Licenses Renewed/Issued	2,215	2,184	2,074	2,100
General Obligation Bond rating	AAA	AAA	AAA	AAA
Receive unmodified audit opinion and GFOA award	Yes	Yes	Yes	Yes
Number of utility accounts per utility billing employee	4,529	4,542	4,545	4,550

### Budget Notes

- The Finance Department issues business and dog licenses, passports, and performs lien searches.
- Carryover set aside for digitalizing financial records, software enhancements, and oncall professional services.

### Adopted 2025-27

- Personnel Services increased due to the addition of a .5 payroll specialist.

Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/finance/about-finance-department>

# City Manager's Office

Pursuant to the Lake Oswego City Charter, the City Manager is appointed by the City Council to carry out council policies and to serve as chief administrative officer of the City. The City Manager manages the business of the City and implements the Council's plans and orders. The City Manager is one of three appointed Charter Officers of the City of Lake Oswego.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 105	\$ 238,963	\$ 300,138	\$ 381,897	\$ 381,897	\$ 381,897
Department Revenues	35,907	2,503	-	-	-	-
General Revenues	816,000	668,000	804,000	871,000	871,000	871,000
Internal Charges for Svcs	2,479,000	3,192,000	3,719,000	3,413,000	3,413,000	3,413,000
<b>Total Resources</b>	<b>\$ 3,331,012</b>	<b>\$ 4,101,466</b>	<b>\$ 4,823,138</b>	<b>\$ 4,665,897</b>	<b>\$ 4,665,897</b>	<b>\$ 4,665,897</b>
<b>Requirements</b>						
Personnel Services	\$ 2,582,717	\$ 3,053,818	\$ 4,022,000	\$ 3,605,000	\$ 3,605,000	\$ 3,605,000
Materials & Services	509,331	698,296	576,000	760,000	760,000	760,000
Department Contingency	-	-	225,138	300,897	300,897	300,897
<b>Total Requirements</b>	<b>\$ 3,092,048</b>	<b>\$ 3,752,114</b>	<b>\$ 4,823,138</b>	<b>\$ 4,665,897</b>	<b>\$ 4,665,897</b>	<b>\$ 4,665,897</b>
<b>FTE</b>	<b>8.7</b>	<b>9.2</b>	<b>10.2</b>	<b>8.5</b>	<b>8.5</b>	<b>8.5</b>

## Budget Notes

- General revenues are allocated to the City Manager's Office for staff and materials for public information programs and publications and maintenance and repairs of downtown amenities.
- Materials and Services include City Manager's Office programs expenses, HelloLO printing and postage costs, as well as ongoing costs for public notices, staff training, and general supplies.

## Adopted 2025-27

- Personnel services decreased due to the moving of the Wastewater Treatment plant project management and the vacant associated FTE to Engineering and elimination of the vacant project specialist positions.

Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/citymanager/about-city-managers-office>

# Facilities Management

Facilities Management provides a variety of support functions to the City organization and its facilities. These include the operation, maintenance and repair services of City Hall, as well as providing support services to other City-owned facilities operated by the other City Departments (i.e. ACC, Library, Fire Stations, etc.).

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 197,528	\$ 543,896	\$ 766,266	\$ 1,264,711	\$ 1,264,711	\$ 1,264,711
Department Revenues	47,079	2,458	-	-	-	-
Internal Charges for Svcs	2,320,000	2,357,000	2,567,000	2,062,000	2,062,000	2,062,000
<b>Total Resources</b>	<b>\$ 2,564,607</b>	<b>\$ 2,903,354</b>	<b>\$ 3,333,266</b>	<b>\$ 3,326,711</b>	<b>\$ 3,326,711</b>	<b>\$ 3,326,711</b>
<b>Requirements</b>						
Personnel Services	\$ 1,151,617	\$ 938,104	\$ 1,287,000	\$ 1,215,000	\$ 1,215,000	\$ 1,215,000
Materials & Services	869,094	1,090,875	1,280,000	1,311,000	1,311,000	1,311,000
Department Contingency	-	-	766,266	800,711	800,711	800,711
<b>Total Requirements</b>	<b>\$ 2,020,711</b>	<b>\$ 2,028,979</b>	<b>\$ 3,333,266</b>	<b>\$ 3,326,711</b>	<b>\$ 3,326,711</b>	<b>\$ 3,326,711</b>
<b>FTE</b>	4.5	4.5	4.5	4.0	4.0	4.0

**Budget Notes**

- Materials and Services includes utilities, repairs, and maintenance services for City Hall and park facilities.
- Department Contingency is for unexpected repairs and maintenance expenses for city owned facilities.

**Adopted 2025-27**

- Personnel Services decreased due to the reallocation of .5 electrician position.

Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/citymanager/facilities-division>

# City Attorney's Office

The City Attorney's Office provides legal advice and representation to the City of Lake Oswego. Legal services to the City include land use matters, public contracting, real estate transactions, labor and employment law, municipal finance, and general municipal law. The office also prosecutes misdemeanor crimes, city code violations, and state traffic offenses.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 129,873	\$ 240,894	\$ 363,176	\$ 543,573	\$ 543,573	\$ 543,573
Department Revenues	11,164	15,036	-	-	-	-
Internal Charges for Svcs	1,655,000	1,720,000	1,889,000	1,680,000	1,680,000	1,680,000
<b>Total Resources</b>	<b>\$ 1,796,037</b>	<b>\$ 1,975,930</b>	<b>\$ 2,252,176</b>	<b>\$ 2,223,573</b>	<b>\$ 2,223,573</b>	<b>\$ 2,223,573</b>
<b>Requirements</b>						
Personnel Services	\$ 1,406,547	\$ 1,377,338	\$ 1,719,000	\$ 1,918,000	\$ 1,918,000	\$ 1,918,000
Materials & Services	148,597	165,771	170,000	102,000	102,000	102,000
Department Contingency	-	-	363,176	203,573	203,573	203,573
<b>Total Requirements</b>	<b>\$ 1,555,144</b>	<b>\$ 1,543,109</b>	<b>\$ 2,252,176</b>	<b>\$ 2,223,573</b>	<b>\$ 2,223,573</b>	<b>\$ 2,223,573</b>
<b>FTE</b>	4.0	4.0	4.0	4.4	4.4	4.4

## Budget Notes

- Personnel includes the city attorney, deputy city attorney, prosecutor, and support staff.
- Materials & Services includes prosecuting attorney contract, litigation not covered by City insurance, and legal research.
- Contingency includes risk management funds.

## Adopted 2025-27

- Changes in personnel services are due to moving the contracted prosecutor to an on-call employee position.

Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/cityattorney/about-city-attorney>

# Human Resources

Human Resource department is responsible for providing a full-range of comprehensive human resources services and programs to the City that will provide leadership, act as a resource, enable the acquisition of a quality work force, provide training and development opportunities, and facilitate communication towards problem solving.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 123,467	\$ 248,094	\$ 290,978	\$ 383,027	\$ 383,027	\$ 383,027
Department Revenues	11,680	6,312	-	-	-	-
Internal Charges for Svcs	1,589,000	1,795,000	1,716,000	1,855,000	1,855,000	1,855,000
<b>Total Resources</b>	<b>\$ 1,724,147</b>	<b>\$ 2,049,406</b>	<b>\$ 2,006,978</b>	<b>\$ 2,238,027</b>	<b>\$ 2,238,027</b>	<b>\$ 2,238,027</b>
<b>Requirements</b>						
Personnel Services	\$ 948,210	\$ 1,079,908	\$ 1,050,000	\$ 1,303,000	\$ 1,303,000	\$ 1,303,000
Materials & Services	527,843	599,072	666,000	732,000	732,000	732,000
Department Contingency	-	-	290,978	203,027	203,027	203,027
<b>Total Requirements</b>	<b>\$ 1,476,053</b>	<b>\$ 1,678,980</b>	<b>\$ 2,006,978</b>	<b>\$ 2,238,027</b>	<b>\$ 2,238,027</b>	<b>\$ 2,238,027</b>
<b>FTE</b>	3.0	3.5	3.0	3.5	3.5	3.5

## Budget Notes

- Materials and Services includes professional charges related to broker services for health insurance and deferred compensation, as well as attorney services, recruitment advertising, drug and alcohol program administration, and other professional services.

## Adopted 2025-27

- Personnel Services increased due to the addition of a .5 HR Specialist.

Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/hr/about-human-resources-0>

# Risk Management

The Risk Management program purchases insurance and researches contingencies to cover the City’s potential liabilities for the following risk exposures: general liability, automobile and other vehicles, unemployment, and workers’ compensation. The City’s insured properties include reservoir sites, vehicles, residential homes, artwork, facilities, and equipment.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Resources</b>						
Beginning Balance	\$ 306,317	\$ 113,374	\$ 249,708	\$ 186,302	\$ 186,302	\$ 186,302
Department Revenues	48,838	138,710	-	-	-	-
General Revenues	-	-	500,000	250,000	250,000	250,000
Internal Charges for Svcs	1,899,000	2,660,000	2,846,000	3,468,000	3,468,000	3,468,000
<b>Total Resources</b>	<b>\$ 2,254,155</b>	<b>\$ 2,912,084</b>	<b>\$ 3,595,708</b>	<b>\$ 3,904,302</b>	<b>\$ 3,904,302</b>	<b>\$ 3,904,302</b>
<b>Requirements</b>						
Materials & Services	\$ 2,140,781	\$ 2,728,842	\$ 3,346,000	\$ 3,718,000	\$ 3,718,000	\$ 3,718,000
Department Contingency	-	-	249,708	186,302	186,302	186,302
<b>Total Requirements</b>	<b>\$ 2,140,781</b>	<b>\$ 2,728,842</b>	<b>\$ 3,595,708</b>	<b>\$ 3,904,302</b>	<b>\$ 3,904,302</b>	<b>\$ 3,904,302</b>

### Budget Notes

- Provides spending authority for attorney fees in City legal matters, city-wide liability insurance, unemployment insurance, and fidelity bonds.

# General - Nondepartmental

This is a miscellaneous category that encompasses a range of support services and administrative functions not assigned to specific departments.

	2019-2021 BN ACTUAL	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-27 PROPOSED	2025-27 APPROVED	2025-27 ADOPTED
<b>Requirements</b>						
Materials & Services	\$ -	\$ 657,770	\$ 3,254,000	\$ -	\$ -	\$ -
Transfers	13,885,000	17,285,060	4,222,000	7,240,000	7,240,000	7,240,000
Department Contingency	-	-	7,786,000	11,749,000	11,749,000	11,749,000
Unappropriated End Bal	30,009,590	32,912,975	10,772,299	12,079,462	12,079,462	12,079,462
<b>Total Requirements</b>	<b>\$ 43,894,590</b>	<b>\$ 50,855,805</b>	<b>\$ 26,034,299</b>	<b>\$ 31,068,462</b>	<b>\$ 31,068,462</b>	<b>\$ 31,068,462</b>

### Budget Notes

#### Adopted 2025-27

- Transfers include the City's contribution to the Willamette Shoreline Trolley Consortium \$40,000, general revenue support to the Street Fund for pavement projects \$6,000,000, and \$1,200,000 to the Capital Reserve Fund.
- Contingency and Unappropriated Ending Fund Balance are sufficient to fulfill the City's 30% minimum fund balance policy.

Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/hr/risk-management>



Capital Improvement Plan (CIP)  
Overview

Citywide Capital Outlay Summary

Capital Improvement Plan  
Funding Summary - Addendum

# Capital Improvement Plan (CIP) Overview

## OVERVIEW

The Capital Improvement Plan (CIP) forecasts the City’s capital needs over a six-year period based on various City-adopted long-range plans, goals and policies. Capital projects are generally large-scale endeavors in terms of cost, size and benefit to the community. The underlying strategy of the CIP is to plan for land acquisition, construction, and major maintenance of public facilities necessary for the safe and efficient provision of services. A critical element of a balanced CIP is the provision of funds to preserve or enhance existing facilities and provide new assets that will aid response to service needs and community growth.

Bi-yearly the CIP will either be fully updated, or an addendum will be provided to identify adjustments to the expenditure of capital funds as approved by the City Council.

The goals of the CIP are to:

- Provide a balanced program for capital improvements given anticipated funding revenues over a six-year planning period,
- Illustrate unmet capital needs based on anticipated funding levels, and
- Provide a plan for capital improvements which can be used in preparing the capital budget for the coming two fiscal years.

Additional information on the process can be located in the long term planning section under financial trends and property taxes as well as at the links below.



Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/engineering/capital-improvement-plan>

# Citywide Capital Outlay Summary 2025-27

Fund	City CIP Projects	Operating Capital*	Total Budgeted Capital Outlay
General	\$ 2,450,000	\$ 2,950,000	\$ 5,400,000
Capital Reserve	1,200,000	-	1,200,000
Water	6,875,000	70,000	6,945,000
Sewer	1,300,000	1,057,000	2,357,000
Stormwater	6,140,000	100,000	6,240,000
Streets	18,655,000	-	18,655,000
SDCs	8,500,000	-	8,500,000
PW Supp Svcs - Motor Pool	-	172,000	172,000
Building	-	116,000	116,000
Public Art	-	24,000	24,000
<b>TOTAL</b>	<b>\$ 45,120,000</b>	<b>\$ 4,489,000</b>	<b>\$ 49,609,000</b>

## \*Operating Capital Summary

Department	Fund	Item	Amount
Information Technology	General	Special purpose server	\$ 195,000
Police	General	Vehicle Replacements	510,000
Fire	General	Vehicle Replacements	75,000
Parks	General	Vehicle and Equipment Replacement	470,000
Parks	General	Park Development Projects	1,700,000
Building	Building	Vehicle Replacement	116,000
Public Art	Public Art	Art Purchase	24,000
Public Works	Water	Vehicle and Equipment Replacement	70,000
Public Works	Sewer	WWTF consulting	850,000
Public Works	Sewer	Equipment Replacement	207,000
Public Works	Stormwater	Vehicle and Equipment Replacement	100,000
Public Works	Support Svcs	Vehicle and Equipment Replacement	172,000
<b>TOTAL</b>			<b>\$ 4,489,000</b>

\*Projects and capital expenses that are budgeted but not included in Capital Improvement Plan (CIP).

Find additional information on the website at this link:  
<https://www.ci.oswego.or.us/engineering/capital-improvement-plan>

# CIP Funding Plan Summary

## CIP FUNDING PLAN SUMMARY - FY 2025/26 - 2030/2031

### Funded Projects

#### Parks Fund

Parks and Open Space	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	Total
Willamette River Greenway Trail Connection	880,000						880,000
West Waluga Park Neighborhood Connector	500,000						500,000
<b>Parks Total</b>	<b>1,380,000</b>						<b>1,380,000</b>

#### Street Fund

Pavement Preservation	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	Total
Lakeview Blvd Street & Drainage Improvements (WO 333)	5,000,000						5,000,000
Pavement Rehabilitation	4,000,000	4,000,000	4,000,000	4,000,000	4,000,000	4,000,000	24,000,000
Blue Heron Rd Rehabilitation & Drainage Improvements	75,000	500,000	2,150,000				2,725,000
2025 Pavement Management (WO 358)	250,000						250,000
Firwood Road Upgrade - Boones Ferry to Waluga					600,000	1,650,000	2,250,000
<b>Intersections</b>							
ODOT ARTS Grant Signalization Improvements	75,000	75,000					150,000
School Zone Flashers	450,000	200,000					650,000
Transportation Grant Match		100,000		100,000		100,000	300,000
McVey-Stafford Enhanced Crossings (MSCVS-1) Lakefront			75,000	250,000			325,000
McVey-Stafford Enhanced Crossings (MSCVS-2) Cornell Signal				250,000	750,000		1,000,000
McVey Stafford Enhanced Crossings (MSCVS-3) Patton					75,000	250,000	325,000
<b>Pathways</b>							
School Adjacent Pathways - McEwan Road (65th to Kristi)	500,000	500,000					1,000,000
School Adjacent Pathways - Bryant Road (Lakeview to Upper)(TSP 37)		500,000	2,000,000				2,500,000
ADA Sidewalk Ramp Retrofit Program	750,000	750,000	750,000	750,000	750,000	750,000	4,500,000
School Adjacent Pathways - Goodall Road (Hazel to Country Club)(TSP 15)			300,000	800,000			1,100,000
School Adjacent Pathways - Fernwood Dr (South Shore to Marjorie)(TSP 11)					250,000	1,250,000	1,500,000
Pedestrian Facility Rehabilitation (Decks & Walls)	500,000						500,000
<b>Large Capital - Equipment</b>							
Street Sweeper	430,000						430,000
<b>Street Total</b>	<b>12,030,000</b>	<b>6,625,000</b>	<b>9,275,000</b>	<b>6,150,000</b>	<b>6,425,000</b>	<b>8,000,000</b>	<b>48,505,000</b>

#### SDC Fund

Street	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	Total
School Adjacent Pathways - Carman Drive (WO 337)(TSP 5)	1,500,000						1,500,000
School Adjacent Pathways - Treetop (WO 363)(TSP 46)	750,000						750,000
School Adjacent Pathways - Meadowlark (WO 362)(TSP 24)	500,000						500,000
School Adjacent Pathways - Pilkington (WO 361)(TSP 122)	250,000						250,000
<b>SDC Total</b>	<b>3,000,000</b>						<b>3,000,000</b>

# CIP Funding Plan Summary

## CIP FUNDING PLAN SUMMARY - FY 2025/26 - 2030/2031

### Funded Projects

<b>Water Fund</b>	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	Total
Cornell Water Main Upgrade (R-05)(F-04)	2,000,000	500,000					2,500,000
Monroe & McNary Regulatory Water Vault	500,000						500,000
Backup Power at RIPs and WTP (WO 332)	250,000						250,000
Reservoir Hatch Replacements	100,000						100,000
Water Valves for System Resiliency	75,000						75,000
Bergis Water Reservoir Replacement (S-07)		2,000,000	4,500,000				6,500,000
Bryant Woods Water System Improvements		500,000	2,500,000				3,000,000
Water Reservoir Painting		250,000					250,000
Pipe Capacity Improvements (D-03)				2,500,000			2,500,000
Touchstone Pump Station Evaluation and Access (P-04 & P-05)				500,000			500,000
Forest Highlands 1 Reservoir Replacement					3,000,000		3,000,000
Water Rehabilitation Program					1,500,000		1,500,000
Forest Highlands Pressure Zone Improvements Phase 1 (F-03)						3,000,000	3,000,000
Filter Covers at the Water Treatment Plant						800,000	800,000
Disinfection Generation at Water Treatment Plant						700,000	700,000
<b>Large Capital - Equipment</b>							
Hydro Excavator		700,000					700,000
<b>Water Total</b>	<b>2,925,000</b>	<b>3,950,000</b>	<b>7,000,000</b>	<b>3,000,000</b>	<b>4,500,000</b>	<b>4,500,000</b>	<b>25,875,000</b>
<b>SDC Fund</b>							
<b>Water</b>	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	Total
McVey Pump Station Replacement (P-01) (WO 340)	5,500,000						5,500,000
<b>SDC Total</b>	<b>5,500,000</b>						<b>5,500,000</b>

# CIP Funding Plan Summary

## CIP FUNDING PLAN SUMMARY - FY 2025/26 - 2030/2031

### Funded Projects

<b>Stormwater Fund</b>	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	Total
Redfern Ave Drainage Improvements (WO 355)	1,375,000	500,000					1,875,000
UIC Decommissioning - Lower Lakeview Blvd (WO 354)	1,250,000						1,250,000
Lakeview Blvd Street & Drainage Improvements (WO 333)	1,000,000						1,000,000
5th Street & Lake Bay Court Drainage Improvements (WO 346)	750,000						750,000
Minor Stormwater Projects	300,000	300,000	300,000	300,000	300,000	300,000	1,800,000
Blue Heron Rd Rehabilitation & Drainage Improvements	25,000	250,000	1,100,000				1,375,000
UIC Decommissioning - Upper Drive/Twin Fir		250,000	850,000				1,100,000
UIC Decommissioning - Lakeview/South Shore to Bryant			250,000	400,000			650,000
Goodall Road Drainage Improvements			250,000	250,000			500,000
Warren Court Drainage Improvements				250,000	250,000		500,000
Ash Street ODOT Highway 43				130,000	400,000		530,000
Bayberry/Rye/Andrews Drainage Improvements					310,000		310,000
Firwood Road Upgrade - Boones Ferry to Waluga					175,000	575,000	750,000
Upper Drive Drainage Improvements, West of Bryant Rd					175,000	575,000	750,000
Dolph Court/Country Club Culvert Crossing					100,000	550,000	650,000
Regional Water Quality Facility Retrofit						750,000	750,000

### Large Capital - Equipment

Service Truck F550 with Crane	140,000						140,000
<b>Stormwater Total</b>	<b>4,840,000</b>	<b>1,300,000</b>	<b>2,750,000</b>	<b>1,330,000</b>	<b>1,710,000</b>	<b>2,750,000</b>	<b>14,680,000</b>

### Sewer Fund

	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	Total
LOIS Repairs - Corrosion Repair (LOIS-4,-5)	150,000						150,000
Pump Replacements at Pump Stations	125,000						125,000
Wastewater Conveyance Rehabilitation		500,000	1,000,000	500,000	1,000,000	500,000	3,500,000
LOIS Repairs - Manhole Infiltration (LOIS-1)		400,000					400,000
Cabana Lane Manhole Replacement		125,000					125,000
Foothills Road Interceptor (T-L1-1)			750,000	2,250,000			3,000,000
Wastewater Pump Station Generators			250,000	750,000			1,000,000
LOIS Repairs - Drop Structure (LOIS-3)			125,000				125,000
Willamette Road Pump Station Upgrades (PS-3)			100,000	650,000			750,000
Blue Heron Trunk (T-BH-1)					750,000	1,250,000	2,000,000
LOIS Repairs - Concrete Repair (LOIS-2)					150,000	1,350,000	1,500,000

### Large Capital - Equipment

Service Truck F550 with Crane			180,000				180,000
Vactor Truck						1,000,000	1,000,000

**Sewer Total**      **275,000**      **1,025,000**      **2,405,000**      **4,150,000**      **1,900,000**      **4,100,000**      **13,855,000**

### General Fund - Library & Fire

	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	Total
<b>Large Capital - Equipment</b>							
Bookmobile, Hold Lockers, and/or Book Vending Machine	320,000	400,000					720,000
Brush Truck		350,000					350,000
Fire Engine		1,200,000					1,200,000
<b>Sewer Total</b>	<b>320,000</b>	<b>1,950,000</b>					<b>2,270,000</b>

**Funded Two-Year Budget Total \$ 45,120,000**

# CIP Funding Plan Summary

## CIP FUNDING PLAN SUMMARY - FY 2025/26 - 2030/2031

### Unfunded Projects

#### Parks and Open Space Unfunded - Parks Fund

Aspen Park Playground Replacement										200,000
Bryant Woods Entry Improvements										220,000
Cooks Butte Trail Renovation										150,000
George Rogers Park ADA Improvements										280,000
Glenmorrie Park Playground Replacement										250,000
Hide-A-Way Park Playground and ADA Improvements										103,500
LO Swim Park Access and ADA Improvements										750,000
Luscher Farm Access and Parking										2,700,000
Outdoor Pickleball Courts										1,500,000
Park Land Acquisition										3,500,000
Park Structure Replacement										1,250,000
Pinecone Park Playground and ADA Improvements										224,000
Rassekh Park Phase 3										5,720,000
Rossman Park Playground and ADA Improvements										289,000
Southwood Park Improvements										750,000
Tryon Cove Park										2,300,000
Westlake Park Athletic Field Upgrades										962,000
<b>Parks Total</b>										<b>21,148,500</b>

#### Bridges Unfunded - Street Fund

Blue Heron Bay at South Shore Blvd Bridge Replacement (BR006)										2,750,000
Lakewood Bay at North Shore Rd (BR001)										3,250,000
Oswego Canal Bridge at Bryant Rd (BR010)										5,000,000
Springbrook Creek at Summit Dr (BR009)										12,500,000
SPRR Overpass, Summit Dr Clackamas County Bridge (BR015)										2,750,000
West Bay at South Shore Blvd (BR005)										3,750,000
<b>Bridges Total</b>										<b>30,000,000</b>



# CIP Funding Plan Summary

## CIP FUNDING PLAN SUMMARY - FY 2025/26 - 2030/2031

### Unfunded Projects

#### Intersections Unfunded - Street Fund

6 Corner Intersection Alignment Improvements (TSP 54)										1,700,000
65th Ave/McEwan Rd Intersection Improvement (TSP 302)										600,000
A Ave/8th Signal Improvements (TSP 66)										100,000
Bangy/Bonita Signal Interconnect (TSP 72)										100,000
Boones Ferry Rd/Knaus Rd Signal Installation										1,900,000
Boones Ferry Rd at Mercantile Pedestrian Crosswalk Signal										150,000
Boones Ferry Rd Signal Interconnect: I-5 to Bryant (TSP 71)										400,000
Bryant Rd/Childs Rd Signal Installation (TSP 68)										900,000
Bryant Rd/Lakeview Blvd Intersection Improvement										775,000
Carman Dr/Bonita Rd/Waluga Dr Signal Installation										3,000,000
Goodall Rd/Country Club/Uplands Dr Signal Installation										4,600,000
Hwy 43/McVey Ave Intersection Improvements (TSP 111)										50,000
Hwy 43/Terwilliger Intersection Improvements (TSP 110)										50,000
Jean Rd/Jean Way Intersection Improvement (TSP 303)										300,000
Stafford Rd/Bergis Rd Signal Installation (TSP 141)										1,600,000
<b>Intersections Total</b>										<b>16,225,000</b>

#### Pathways Unfunded - Street Fund

5th St at A Ave Crossing: RRFB Retrofit										20,000
10th Street Sidewalk: E Ave to G Ave (TSP 215)										550,000
65th Ave Bike Lanes, Sidewalks: Lakeview Blvd to Childs Rd (TSP 131)										3,325,000
Ash St Sidewalk & Pathway: Erickson to O'Brien St (TSP 176)										825,000
Atwater Rd Sidewalks: Knaus Rd to Boca Ratan Dr (TSP 213)										1,025,000
B Ave Sidewalk: 9th St to 10th St (TSP 218)										35,000
Barton Rd Pathway: Riven Dell Rd to Childs Rd (TSP 184)										1,500,000
Bergis Rd/Cornell Pathway: Bergis Farm Dr/Cornell St to existing path (TSP 100)										900,000
Berwick Rd Pathway: Berwick Ct to Ellis Ave (TSP 44)										60,000
Bonita Rd Sidewalks/Bike Lanes: Bangy Rd to Carman Dr (TSP 80)										5,700,000
Boones Ferry Rd Bike Lanes: Country Club to northern city limits (TSP 36)										1,500,000
Boones Ferry Rd Pathway: Washington Ct to Pilkington Rd (TSP 132)										200,000
Botticelli Bike Lanes Reconstruction: Melrose to Touchstone (TSP 93.1)										2,250,000
Botticelli Bike Lane: Melrose to Touchstone (TSP 93.2)										25,000
Bridgeport to Milwaukie Regional Trail Connection: Upper Dr to Bridgeport to Milwaukie Regional Trail (TSP 194)										400,000
Burma Rd Sidewalks: Bangy Rd to Carman Dr (TSP 199)										1,200,000
C Ave Sidewalk: 10th St to Country Club (TSP 219)										700,000
Canyon Dr Neighborhood Pathway: Dellwood to South Shore (TSP 4)										900,000
Centerwood St Sidewalk: Red Leaf to city limit (TSP 84)										175,000
Childs Rd (east) Pathway: Stafford to 35th (TSP 97)										5,500,000
Childs Rd (west) Pathway: Canal Rd to Sycamore Ave (TSP 7)										625,000
Cloverleaf Dr Sidewalk: Banyan to Fernwood Dr (TSP 53)										525,000
Cornell at McVey: Enhance Pedestrian Crossing										75,000





# CIP Funding Plan Summary

## CIP FUNDING PLAN SUMMARY - FY 2025/26 - 2030/2031

### Unfunded Projects

#### Pathways Unfunded Continued - Street Fund

Washington Court Pathway: Queens Park Rd to Lake Forest Blvd (TSP 32)									800,000
Westlake Dr Sidewalk: Kruse Way to Amberwood Circle (TSP 85)									725,000
Westview Dr Sidewalk: Greentree Rd to South Shore (TSP 33)									1,400,000
Willamette Greenway Trail: Willamette Shore Line (Trolley) Trail (TSP 95)									7,500,000
Willamette River Greenway Trail: Foothills Park-Tryon Cove Park (TSP 87)									1,900,000
Willamette River Greenway Trail: George Rogers Park-Riverbend Condos (TSP 86)									500,000
Willamette River Greenway Trail: Roehr Park Pathway Repair/Upgrade (TSP 28)									400,000
Willamette Steps (TSP 137)									3,500,000
<b>Pathways Total</b>									<b>157,845,000</b>

#### Water Unfunded - Water Fund

6th Pump at Water Treatment Plant (P-03)									1,400,000
Altitude Valves for Reservoir Balances (S-09)									600,000
City View Reservoir Rehabilitation									800,000
Cooks Butte Reservoir Rehabilitation									800,000
Filter Media Replacement at Water Treatment Plant									1,400,000
Forest Highlands #2 Reservoir Rehabilitation									1,400,000
Knaus Pressure Zone - Pipe Resiliency Improvements (R-04)									2,500,000
Knaus Reservoir Updates									300,000
McNary #1 Reservoir Rehabilitation									1,100,000
McNary Pressure Zone - Fire Flow Improvements (F-02)									1,500,000
Palisades #1 Reservoir Replacement									4,000,000
Palisades Pressure Zone - Pipe Resiliency Improvements (R-03)									4,000,000
pH Control for Optimization at Water Treatment Plant									800,000
Pipe Capacity Improvements (D-02)									3,250,000
Pipe Capacity Improvements (D-04)									325,000
Pipe Capacity Improvements (D-05)									3,250,000
Southside High Pressure Improvements									2,000,000
Southside Low Pressure Improvements									2,000,000
Southside Reservoir #2 (S-04)									6,900,000
Southside Reservoir Rehabilitation									1,100,000
Summit Pressure Zone - Fire Flow Improvements (F-01)									700,000
Summit Reservoir Rehabilitation									1,400,000
Touchstone Reservoir Rehabilitation									1,700,000
Waluga Pressure Zone Pipe Resiliency Improvements (R-06)									6,000,000
Waluga Pressure Zone Pipe Resiliency Improvements (R-07)									3,000,000
Water Pump Stations Upgrades (P-06, P-04)									1,250,000
<b>Water Total</b>									<b>53,475,000</b>

# CIP Funding Plan Summary

## CIP FUNDING PLAN SUMMARY - FY 2025/26 - 2030/2031

### Unfunded Projects

#### Stormwater Unfunded - Stormwater Fund

Andrews Road & Sunningdale Road Drainage Improvements									900,000
Bickner Street to McVey Ave Stormwater Replacement									1,100,000
Cedar Court Drainage Improvements									375,000
Chandler Road Drainage Improvements									700,000
Cherry Crest Detention - Water Quality Treatment Facility									1,100,000
Douglas Circle Drainage Improvements									800,000
Eena Road Drainage Improvements									450,000
Elizabeth Gress Park Sediment Control/Restoration									375,000
Foothills/A Ave Drainage Improvements									1,600,000
Glen Eagles Road Drainage Improvements									1,600,000
Lakeview Blvd Drainage Improvements - West of Jean Road									1,375,000
Lakeview Blvd Drainage Improvements (Bryant to South Shore)									550,000
Lower Boones Ferry Road - Lake Grove UGB									5,500,000
Maple Street Drainage Improvements									175,000
Melrose St Tributary Rehabilitation									550,000
Oakridge/Trillium Woods Drainage Improvements									550,000
Preakness Ct Water Quality/Detention									275,000
Regional Stormwater Facility- Bergis/Stafford Road									1,200,000
Sediment Basin Evaluation & Retrofits									675,000
Sher Lane Drainage Improvements									600,000
Southwood Park Detention									250,000
Sunbrook Drive Drainage Improvements									400,000
Tanglewood Drive Water Quality/Detention									250,000
Touchstone Dr Drainage Improvements									175,000
Uplands Drainage Improvements (Ridgecrest to County Club)									2,200,000

**Stormwater Total**      23,725,000

#### Sewer Unfunded - Sewer Fund

Canal Trunk (T-CAN-1 & P-CAN-1)									5,000,000
Downtown Trunk (T-DWN-2)									1,750,000
Downtown Trunk 3 & 4 (T-DWN-3 & T-DWN-4)									200,000
East Mountain Park Trunk (T-EMP-1)									500,000
East Mountain Park Trunk (T-EMP-2, T-EMP-3)									12,000,000
Foothills Road Pump Station (PS-4)									750,000
Forest Highlands Trunk (T-FH-1)									2,750,000
I/I Reduction Program Priority B Projects (G-3)									33,000,000
L5 Basin Trunk (T-L5-1)									80,000
McVey Trunk (T-MCV-1, T-MCV-2)									6,500,000
New Canal Basin Pump Station (PS-7)									1,800,000

# CIP Funding Plan Summary



# CIP Funding Plan Summary

## CIP FUNDING PLAN SUMMARY - FY 2025/26 - 2030/2031

### Unfunded Projects

#### Sewer Unfunded Continued - Sewer Fund

Other Pipeline Repair Projects for Major Collectors (P-1)						6,000,000
Rebuild Lift Station and Pressure Mains						1,250,000
Riverfront Trunk (T-RF-2)						700,000
South Lake Trunk (T-SL-1)						175,000
South Shore Trunk (T-SS-1)						600,000
Southwood Trunk (P-SW-1)						775,000
Wastewater Flow Data Tracking (PS-6)						600,000
West Mountain Park Trunk (T-WMP-1)						775,000

Sewer Total      75,205,000

Parks Unfunded =	\$21,148,500
Street Unfunded =	\$372,135,000
Water Unfunded =	\$53,475,000
Stormwater Unfunded =	\$23,725,000
Sewer Unfunded =	\$75,205,000

**Total Unfunded Projects      \$545,688,500**





**Appendix**

**Positions and Salary Ranges**

**Historical Summary of FTE**

**Positions**

**Long Range Financial Planning**

**Major Fund Forecasts**

**Department Description and**

**Goals**

**Budget Resolution**

# Positions & Salary Ranges

FTE	POSITION	Monthly Salary Range (as of July 1, 2024)			Annual Salary Range (as of July 1, 2024)		
		low	high	low	high	low	high
<b>CITY ATTORNEY'S OFFICE</b>							
1	City Attorney		\$15,901			\$190,806	
0.4	City Prosecutor					\$156,000	
1	Deputy City Attorney II	10,088	-	12,387	121,061	-	148,643
1	Legal Assistant	6,081	-	7,391	72,969	-	88,695
1	Administrative Support II	4,599	-	5,875	55,185	-	70,494
4.4							
<b>CITY MANAGER'S OFFICE</b>							
1	City Manager		17,159			205,907	
0.5	Assistant City Manager/HR Director	12,463	-	15,157	149,558	-	181,882
1	Assistant to the City Manager	8,353	-	10,154	100,239	-	121,851
1	City Recorder	7,956	-	9,671	95,476	-	116,048
1	Public Information Specialist	7,438	-	9,483	89,256	-	113,801
1	Management Analyst	6,724	-	8,580	80,686	-	102,964
1	Equity Program Manager	6,724	-	8,580	80,686	-	102,964
1	Project Coordinator (Mgmt/Sustainability)	6,724	-	8,580	80,686	-	102,964
0.8	Administrative Assistant	5,679	-	6,993	68,143	-	83,910
0.2	<i>Part-time employee(s)</i>						
8.5							
<b>FACILITIES MANAGEMENT DEPARTMENT</b>							
1	Facilities Manager	7,336	-	8,913	88,029	-	106,958
1	Facilities Maintenance Lead	5,564	-	7,107	66,771	-	85,283
2	Facilities Maintenance Technician	4,840	-	6,178	58,076	-	74,134
4							
<b>FINANCE DEPARTMENT</b>							
1	Finance Director	12,463	-	15,157	149,558	-	181,882
1	Assistant Finance Director	10,088	-	12,387	121,061	-	148,643
1	Payroll Administrator	6,693	-	8,135	80,312	-	97,618
3	Accountant	6,219	-	7,923	74,633	-	95,081
1	Payroll Specialist	5,679	-	6,993	68,143	-	83,910
5	Accounting Specialist III	5,036	-	6,429	60,426	-	77,150
1	Administrative Support II	4,599	-	5,875	55,185	-	70,494
13							
<b>FIRE DEPARTMENT</b>							
1	Fire Chief	12,463	-	15,157	149,558	-	181,882
1	Assistant Fire Chief	11,551	-	14,042	138,617	-	168,507
1	Fire Marshal	10,863	-	13,203	130,359	-	158,440
3	Battalion Chief	10,088	-	12,387	121,061	-	148,643
2	EMS Coordinator	8,783	-	11,210	105,398	-	134,519
1	Senior Living Paramedic		8,583			103,000	
21	Fire Lieutenant	8,369	-	10,818	100,432	-	129,812
1	Deputy Fire Marshall	7,958	-	10,187	95,496	-	122,246
14	Fire Driver / Engineer	7,691	-	10,054	92,292	-	120,648
6	Fire Fighter / Paramedic	7,094	-	9,311	85,122	-	111,726
1	Office Manager	5,679	-	6,993	68,143	-	83,910
1	Administrative Support II	4,599	-	5,875	55,185	-	70,494
53							

Find additional information on the website at this link:

<https://www.ci.oswego.or.us/hr/compensation-plan>

# Positions & Salary Ranges

FTE	POSITION	Monthly Salary Range (as of July 1, 2024)			Annual Salary Range (as of July 1, 2024)		
		low	high	low	high		
<b>HUMAN RESOURCES DEPARTMENT</b>							
0.5	Assistant City Manager/HR Director	12,463	-	15,157	149,558	-	181,882
2	Human Resources Analyst	6,693	-	8,135	80,312	-	97,618
1	Human Resources Specialist	5,679	-	6,993	68,143	-	83,910
<u>3.5</u>							
<b>INFORMATION TECHNOLOGY DEPARTMENT</b>							
1	Chief Technology Officer	11,551	-	14,042	138,617	-	168,507
1	Network Administrator	8,795	-	10,692	105,543	-	128,299
2	Network Engineer	7,438	-	9,483	89,256	-	113,801
4	Microcomputer Analyst	7,062	-	9,014	84,743	-	108,164
0.5	Digital & Graphic Media Specialist	5,190	-	6,622	62,278	-	79,459
1	Administrative Support Iii	4,840	-	6,178	58,076	-	74,134
<u>9.5</u>							
<b>LIBRARY DEPARTMENT</b>							
1	Library Director	11,551	-	14,042	138,617	-	168,507
3	Library Manager	7,336	-	8,913	88,029	-	106,958
1	Communication Coordinator	6,219	-	7,923	74,633	-	95,081
1	Administrative Assistant	5,537	-	7,062	66,438	-	84,743
5	Librarian II	5,403	-	6,896	64,836	-	82,746
3	Lead Library Assistant	5,190	-	6,622	62,278	-	79,459
3	Library Assistant II	4,093	-	5,225	49,111	-	62,694
16.7	<i>Part-time employee(s)</i>						
<u>33.7</u>							
<b>MUNICIPAL COURT DEPARTMENT</b>							
1	Municipal Court Manager	7,336	-	8,913	88,029	-	106,958
2	Administrative Support II	4,599	-	5,875	55,185	-	70,494
0.5	<i>Part-time employee(s)</i>						
<u>3.5</u>							
<b>PARKS - ADMINISTRATION &amp; RECREATION</b>							
1	Director of Parks & Recreation	11,551	-	14,042	138,617	-	168,507
1	Assistant Director Parks and Recreation	8,795	-	10,692	105,543	-	128,299
1	Facility Superintendent	7,956	-	9,671	95,476	-	116,048
0.5	Sports Manager	7,336	-	8,913	88,029	-	106,958
3.8	Recreation Supervisor II	6,693	-	8,135	80,312	-	97,618
2	Park Analyst/Project Manager	6,724	-	8,580	80,686	-	102,964
1	Public Information Coordinator	6,724	-	8,580	80,686	-	102,964
1	Maintenance Technician	5,036	-	6,429	60,426	-	77,150
7	Recreation Specialist II	5,537	-	7,062	66,438	-	84,743
1	Recreation Specialist I	4,840	-	6,178	58,076	-	74,134
0.5	Digital & Graphic Media Specialist	5,190	-	6,622	62,278	-	79,459
3	Administrative Support II	4,599	-	5,875	55,185	-	70,494
39.3	<i>Part-time employee(s)</i>						
<u>62.1</u>							

# Positions & Salary Ranges

FTE	POSITION	Monthly Salary Range (as of July 1, 2024)		Annual Salary Range (as of July 1, 2024)			
		low	high	low	high		
<b>PARKS - MAINTENANCE DIVISION</b>							
1	Assistant Director Parks and Recreation	8,795	-	10,692	105,543	-	128,299
1	Parks Superintendent	7,956	-	9,671	95,476	-	116,048
0.5	Urban Forester	6,724	-	8,580	80,686	-	102,964
3	Parks Crewleader	6,029	-	7,686	72,345	-	92,231
1	Natural Resources and Stewardship	5,403	-	6,896	64,836	-	82,746
2	Park Ranger	5,190	-	6,622	62,278	-	79,459
3	Senior Parks Specialist	5,190	-	6,622	62,278	-	79,459
1	Administrative Support II	4,599	-	5,875	55,185	-	70,494
1	Administrative Support III	4,840	-	6,178	58,076	-	74,134
6	Park Specialist	4,840	-	6,178	58,076	-	74,134
0.9	<i>Part-time employee(s)</i>						
20.4							
<b>PARKS - GOLF COURSE DIVISION</b>							
0.5	Sports Manager	7,336	-	8,913	88,029	-	106,958
1	Recreation Specialist II	5,537	-	7,062	66,438	-	84,743
2	Senior Parks Specialist	5,452	-	6,622	65,418	-	79,459
3.5							
86	<b>TOTAL PARKS</b>						
<b>ADULT COMMUNITY CENTER</b>							
1	ACC Manager	7,336	-	8,913	88,029	-	106,958
1	Program Supervisor	5,679	-	6,993	68,143	-	83,910
1	Administrative Assistant	5,537	-	7,062	66,438	-	84,743
1	Facilities Maintenance Technician	4,840	-	6,178	58,076	-	74,134
1	Administrative Support II	4,599	-	5,875	55,185	-	70,494
3.3	<i>Part-time employee(s)</i>						
8.3							
<b>TENNIS FACILITY</b>							
1	Recreation Specialist II	5,537	-	7,062	66,438	-	84,743
2.1	<i>Part-time employee(s)</i>						
3.1							
<b>PLANNING</b>							
0.8	Community Development Director	12,463	-	15,157	149,558	-	181,882
2	Planning Manager	8,795	-	10,692	105,543	-	128,299
1	Senior Development Specialist	6,724	-	8,580	80,686	-	102,964
2	Senior Planner	6,724	-	8,580	80,686	-	102,964
1	Senior Code Enforcement Specialist	6,724	-	8,580	80,686	-	102,964
4	Associate Planner	6,219	-	7,923	74,633	-	95,081
1	Code Enforcement Specialist	6,219	-	7,923	74,633	-	95,081
2	Administrative Assistant	5,537	-	7,062	66,438	-	84,743
1	Administrative Support III	4,840	-	6,178	58,076	-	74,134
0.8	<i>Part-time employee(s)</i>						
15.6							

# Positions & Salary Ranges

FTE	POSITION	Monthly Salary Range (as of July 1, 2024)		Annual Salary Range (as of July 1, 2024)			
		low	high	low	high		
<b>POLICE DEPARTMENT</b>							
1	Police Chief	12,463	-	15,157	149,558	-	181,882
1	Police Captain	11,551	-	14,042	138,617	-	168,507
3	Police Lieutenant	10,863	-	13,203	130,359	-	158,440
9	Police Sergeant	9,704	-	11,798	116,443	-	141,570
1	Police Records Lead	6,455	-	8,239	77,462	-	98,866
1	Behavioral Health Specialist	6,124	-	7,821	73,489	-	93,853
33	Police Officer	6,124	-	7,821	73,489	-	93,853
1	Administrative Assistant (Conf)	5,679	-	6,993	68,143	-	83,910
1	Evidence Technician	5,415	-	6,720	64,982	-	80,645
1	Behavioral Health Case Worker	5,415	-	6,720	64,982	-	80,645
3	Community Service Officer	5,415	-	6,720	64,982	-	80,645
3	Administrative Support II	4,599	-	5,875	55,185	-	70,494
<hr/>							
58							
<b>LOCOM</b>							
1	Communications Manager	10,863	-	13,203	130,359	-	158,440
2	Communications Operations Supervisor	9,704	-	11,798	116,443	-	141,570
2	Lead Communications Operator	6,124	-	7,821	73,489	-	93,853
6	Senior Communications Operator	5,488	-	6,878	65,855	-	82,538
6	Communications Operators	4,978	-	6,259	59,740	-	75,112
<hr/>							
17							
75	<b>TOTAL POLICE</b>						
<b>REDEVELOPMENT</b>							
1	Redevelopment Mgr/Asst to City Mgr	8,353	-	10,154	100,239	-	121,851
0.3	Administrative Assistant	5,679	-	6,993	68,143	-	83,910
<hr/>							
1.3							
<b>BUILDING</b>							
0.2	Community Development Director	12,463	-	15,157	149,558	-	181,882
1	Permit Ctr Manager/Building Official	9,704	-	11,798	116,443	-	141,570
2	Plans Examiner II	6,724	-	8,580	80,686	-	102,964
2	Building Inspector III	6,526	-	8,334	78,315	-	100,010
1	Senior Electrical Inspector	7,062	-	9,014	84,743	-	108,164
2	Plans Examiner I	6,086	-	7,767	73,032	-	93,208
2	Permit Technician II	5,537	-	7,062	66,438	-	84,743
<hr/>							
10.2							

# Positions & Salary Ranges

FTE	POSITION	Monthly Salary Range (as of July 1, 2024)			Annual Salary Range (as of July 1, 2024)		
		low	high	low	high		
<b>ENGINEERING DEPARTMENT</b>							
1	City Engineer/Public Works Director	12,463	-	15,157	149,558	-	181,882
1	Director of Special Projects	10,863	-	13,203	130,359	-	158,440
1	Assistant City Engineer	10,088	-	12,387	121,061	-	148,643
1	Engineering Services Manager	10,088	-	12,387	121,061	-	148,643
1	GIS Services Supervisor	7,956	-	9,671	95,476	-	116,048
2	Senior Associate Engineer	7,790	-	9,943	93,479	-	119,313
1	Engineering Development Coord.	7,438	-	9,483	89,256	-	113,801
1	Citizen Information Specialist	7,438	-	9,483	89,256	-	113,801
2	Associate Engineer	7,280	-	9,288	87,363	-	111,451
1	Chief Surveyor	7,062	-	9,014	84,743	-	108,164
1	Engineering Program Lead	6,724	-	8,580	80,686	-	102,964
1	ADA Coordinator	6,724	-	8,580	80,686	-	102,964
1	Construction Inspector	6,455	-	8,239	77,462	-	98,866
1	Engineering Program Coordinator	6,455	-	8,239	77,462	-	98,866
4	Engineering Technician III	6,455	-	8,239	77,462	-	98,866
1	Technical Support Analyst (GIS)	6,455	-	8,239	77,462	-	98,866
1	Engineering Technician II	5,564	-	7,107	66,771	-	85,283
1	Technical Support Specialist (GIS)	5,564	-	7,107	66,771	-	85,283
1	Administrative Assistant	5,537	-	7,062	66,438	-	84,743
1	Administrative Support III	4,840	-	6,178	58,076	-	74,134
1	Administrative Support I	4,093	-	5,225	49,111	-	62,694
0.7	<i>Part-time employee(s)</i>						
26.7							
<b>PUBLIC WORKS SUPPORT SERVICES DEPARTMENT</b>							
1	Deputy Public Works Director	10,088	-	12,387	121,061	-	148,643
1	Maintenance Field Services Manager	8,795	-	10,692	105,543	-	128,299
1	Management and Program Analyst	6,724	-	8,580	80,686	-	102,964
1	Technical Support Coordinator	6,724	-	8,580	80,686	-	102,964
1	City Beautification Speciaist	6,029	-	7,686	72,345	-	92,231
1	Lead Fleet Technician	5,564	-	7,107	66,771	-	85,283
1	Support Services Specialist	5,537	-	7,062	66,438	-	84,743
2	Fleet Technician	5,190	-	6,622	62,278	-	79,459
1	Administrative Support III	4,840	-	6,178	58,076	-	74,134
10							
<b>SEWER - Maintenance Services Division</b>							
1	Utility Superintendent	7,336	-	8,913	88,029	-	106,958
1	Crewleader	6,029	-	7,686	72,345	-	92,231
4	Utility Technician	4,840	-	6,178	58,076	-	74,134
0.8	<i>Part-time employee(s)</i>						
6.8							
<b>STORMWATER - Maintenance Services Division</b>							
1	Utility Superintendent	7,336	-	8,913	88,029	-	106,958
1	Crewleader	6,029	-	7,686	72,345	-	92,231
1	Senior Utility Technician	5,190	-	6,622	62,278	-	79,459
3	Utility Technician	4,840	-	6,178	58,076	-	74,134
6							

# Positions & Salary Ranges

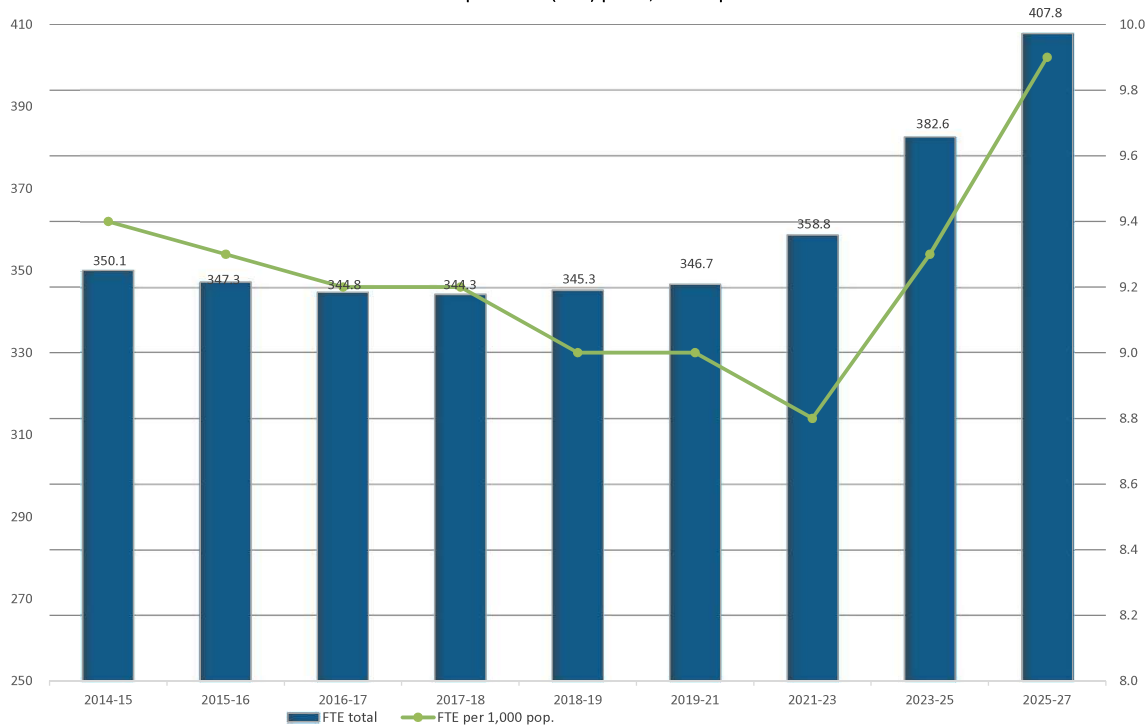
0	POSITION	Monthly Salary Range (as of July 1, 2024)			Annual Salary Range (as of July 1, 2024)		
		low	high	low	high		
<b>STREET - Maintenance Services Division</b>							
1	Maintenance Field Services Manager	8,795	-	10,692	105,543	-	128,299
0.5	Urban Forester	6,724	-	8,580	80,686	-	102,964
1	Crewleader	6,029	-	7,686	72,345	-	92,231
4	Utility Technician	4,840	-	6,178	58,076	-	74,134
<hr/>							
6.5							
<b>WATER - Water Treatment and Maintenance Services Divisions</b>							
1	Water Treatment Plant Manager	10,088	-	12,387	121,061	-	148,643
1	Asst. Water Treatment Plant Manager	7,956	-	9,671	95,476	-	116,048
1	Utility Superintendent	7,336	-	8,913	88,029	-	106,958
5	WTP Operator IV	6,526	-	8,334	78,315	-	100,010
1	Water Conservation Specialist	6,455	-	8,239	77,462	-	98,866
2	WTP Operator III	6,029	-	7,686	72,345	-	92,231
1	Instrumentation Technician	6,526	-	8,334	78,315	-	100,010
1	Crewleader	6,029	-	7,686	72,345	-	92,231
1	Administrative Assistant	5,537	-	7,062	66,438	-	84,743
1	Maintenance Technician	5,036	-	6,429	60,426	-	77,150
4	Utility Technician	4,840	-	6,178	58,076	-	74,134
<hr/>							
0.3	<i>Part-time employee(s)</i>						
<hr/>							
19.3							
<hr/>							
342.3	<b>Total Full-Time Positions</b>						
65.5	<b>Total Part-Time FTEs</b>						
407.8	<b>Total Full-Time Equivalents (FTEs)</b>						

# Historical Summary of Full-Time Equivalent (FTE) Positions

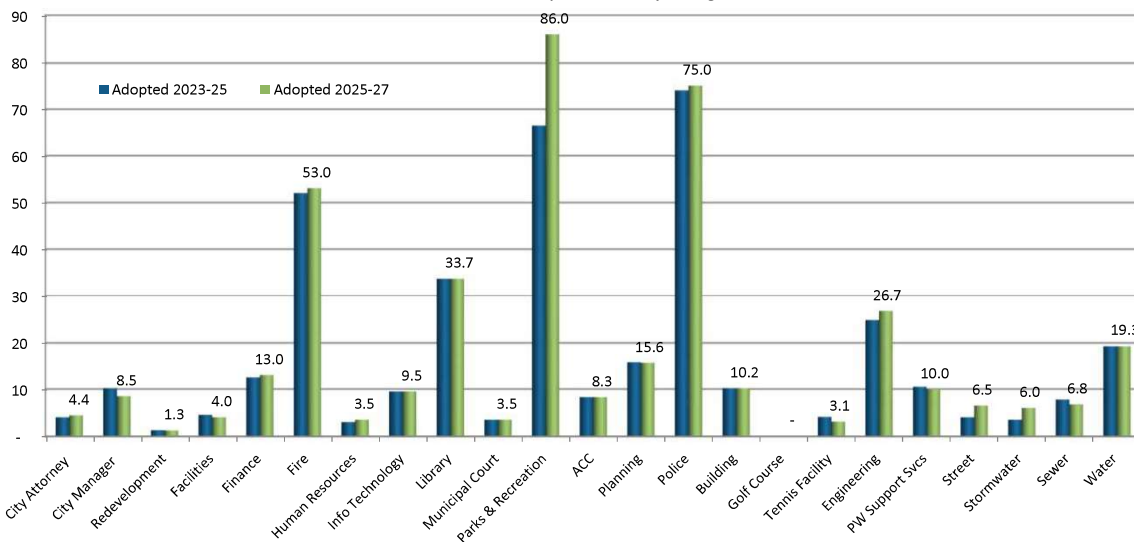
Year	General															Total
	CAO	CMO	LORA	Facilities	Finance	Fire	HR	IT	Library	Court	P&R*	ACC	Plan	Police	Comm	
2014-15	4.0	9.1	1.4	4.0	10.1	52.0	3.0	9.5	33.7	3.5	39.1	8.6	15.4	52.5	16.5	262.4
2015-16	4.0	7.4	1.4	4.0	10.1	52.0	3.0	9.5	33.7	3.5	38.1	8.6	13.8	52.5	16.5	258.1
2016-17	4.0	7.3	1.7	4.5	10.1	52.0	3.0	9.5	33.7	3.5	38.1	8.6	13.5	52.0	16.5	258.0
2017-18	4.0	7.2	1.1	4.5	10.1	52.0	3.0	9.5	33.7	3.5	38.1	8.6	14.5	52.0	16.5	258.3
2018-19	4.0	8.2	1.1	4.5	10.1	52.0	3.0	9.5	33.7	3.5	38.1	8.6	14.5	51.0	17.5	259.3
2019-21	4.0	8.7	1.3	4.5	10.5	52.0	3.0	9.5	33.7	3.5	42.4	8.6	14.5	52.0	16.5	264.7
2021-23	4.0	9.2	1.3	4.5	10.5	52.0	3.5	9.5	33.7	3.5	44.4	8.6	15.5	57.0	17.0	274.2
2023-25	4.0	10.2	1.3	4.5	12.5	52.0	3.0	9.5	33.7	3.5	66.3	8.3	15.7	57.0	17.0	298.5
2025-27	4.4	8.5	1.3	4.0	13.0	53.0	3.5	9.5	33.7	3.5	86.0	8.3	15.6	58.0	17.0	319.3

\* Golf is included in Parks as of 7-1-19.

Full-time Equivalent (FTE) per 1,000 Population



FTE's Per Department by Budget Period



# Historical Summary of Full-Time Equivalent (FTE) Positions

Building	Parks & Rec - Other			Public Works								FTE total	Full-time	Part-time	City population	FTE per 1,000 pop.
	Golf*	Tennis	Total	Engr	Support Svc	Street	Storm	Sewer	Water	LO-Tig	Total					
7.8	5.0	3.1	8.1	22.8	9.9	5.1	3.8	6.0	17.2	7.0	71.8	350.1	302.0	48.1	37,105	9.4
8.8	5.0	3.1	8.1	22.8	11.0	5.0	3.8	6.0	17.7	6.0	72.3	347.3	303.0	44.3	37,300	9.3
8.9	5.0	3.1	8.1	22.8	10.0	5.0	3.9	6.2	18.9	3.0	69.8	344.8	303.0	41.8	37,430	9.2
9.1	4.3	3.1	7.4	24.3	10.0	4.0	3.9	7.2	19.8	0.3	69.5	344.3	302.0	42.3	37,497	9.2
9.1	4.3	3.1	7.4	24.5	10.0	4.0	3.9	7.2	19.9	-	69.5	345.3	304.0	41.3	38,215	9.0
9.1	-	3.1	3.1	25.3	9.5	4.0	3.9	7.2	19.9	-	69.8	346.7	306.0	40.7	38,705	9.0
9.1	-	3.1	3.1	25.8	9.6	4.5	3.6	7.8	21.2	-	72.4	358.8	318.0	40.8	40,711	8.8
10.2	-	4.1	4.1	24.8	10.5	4.0	3.5	7.8	19.3	-	69.9	382.6	330.2	52.4	40,924	9.3
10.2	-	3.1	3.1	26.7	10.0	6.5	6.0	6.8	19.3	-	75.3	407.8	341.6	66.2	41,129	9.9

The table below summarizes the changes in FTEs from the current biennial budget for 2025-27 with the prior biennial budget for 2023-25:

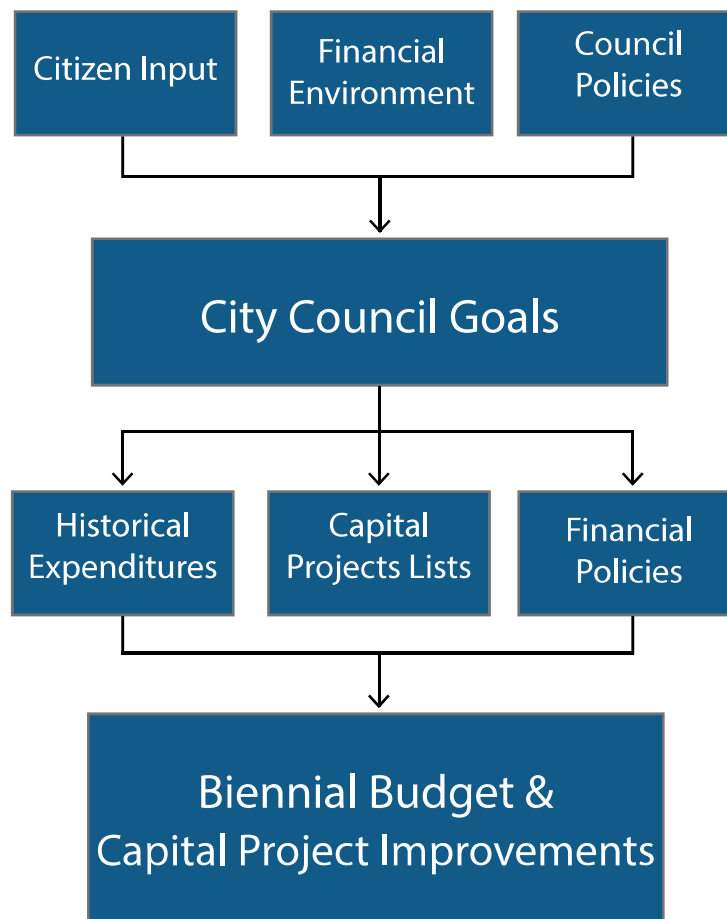
	<u>Moved</u>	<u>New</u>	
General:			
CAO		0.4	Moved the contracted prosecutor to an on-call position
CMO		(0.7)	Eliminated Project Specialist
CMO	(1.0)		Redistributed Deputy City Manager to Engineering for Director of Special Projects
Facilities	(0.5)		Redistributed Electrician to PW Support Svs
Finance		0.5	Add Payroll Specialist
Fire		1.0	Added grant funded position
HR		0.5	Added HR Specialist
Parks	1.0		Redistributed Administrative Support Staff from Tennis
Parks		1.5	Added Urban Forester and Natural Resources Stewardship
Parks		17.2	FTE added for LORAC operations
Planning		(0.1)	Redistributed Administrative Support Staff
Police		1.0	Added grant funded position
<b>Total General</b>	<u>(0.5)</u>	<u>21.3</u>	
Tennis:	<u>(1.0)</u>		Redistributed Administrative Support Staff to LORAC
Engineering:		1.0	Added Engineering Tech
		(0.1)	Redistributed PT, Temp position and admin support
	<u>1.0</u>		Redistributed for Direct of Special Projects
	1.0	0.9	
Public Works Support Services:	(1.5)		Redistributed Electrical Positions
	1.0		Added Fleet Technician
	<u>(0.5)</u>		
Street Maintenance:	1.0		Redistributed from Sewer
		0.5	Added Urban Forester
	<u>1.0</u>	<u>1.0</u>	Added Utility Technician
	1.0	1.5	
Stormwater Maintenance:		0.5	Added Utility Superintendent
	<u>1.0</u>	<u>1.0</u>	Added 2 Utility Technician one was redistribution of electrician position
	1.0	1.5	
Sewer Maintenance:	<u>(1.0)</u>		Redistributed to Street
<b>Total Change</b>	<b>-</b>	<b>25.2</b>	
		<b>BN25 FTEs</b>	<b>382.6</b>
		<b>BN27 FTEs</b>	<b>407.8</b>

	BN25	BN27	Change
Regular positions (Full-time & Part-time)	330.2	341.6	11.4
Temporary positions	52.4	66.2	13.8
<b>FTEs</b>	<b>382.6</b>	<b>407.8</b>	<b>25.2</b>

# Long Range Financial Planning Process

## LONG RANGE PROCESS

1. City Council meets to discuss the next set of goals they would like the city to achieve or focus on in the short and long term. They are based on City Council policy, citizen input, and the financial environment as addressed in the Budget Message.
2. Council Goals are then adopted and used to guide the budget process.
3. Goals are used alongside historical expenditures and capital project lists kept by public works and engineering.
4. Balancing council goals with the historical trends and capital projections creates the foundation of the budget as well as the city's long term plan for capital improvements as seen on page 41.



The city also looks at a six year forecast to assist in projecting out the current budget cycle and in planning for the next one. The forecast includes general inflation, energy inflation, medical inflation, and new developments. They are adjusted out based on high or low percentage changes. The following pages contain forecasts for all major funds for the next two biennium.

# General Fund Forecast BN2027-29 & BN2029-31 and Assumptions Used

	BN 2021-2023 ACTUAL	BN 2023-2025 BUDGET	BN 2025-2027 BUDGET	BN 2027-2029 PROJECTION	BN 2029-2031 PROJECTION
<b>Resources</b>					
Beginning Balance	\$ 32,952,746	\$ 34,519,973	\$ 40,111,987	\$ 34,170,987	\$ 37,305,987
Property Taxes	81,065,234	85,600,000	92,680,000	100,685,000	104,209,000
Franchise Fees	6,717,357	7,765,000	8,760,000	9,023,000	9,294,000
Intergovernmental	21,997,057	12,116,000	14,663,000	13,092,000	13,616,000
Licenses and Fees	5,230,738	4,365,000	5,192,000	5,348,000	5,508,000
Fines and Forfeitures	1,822,607	1,850,000	1,880,000	1,936,000	1,994,000
Sales and Services	11,003,179	13,558,000	17,352,000	17,873,000	18,409,000
Miscellaneous Revenues	2,060,416	987,000	2,218,000	2,218,000	2,218,000
Charges for Services	19,167,000	22,152,000	23,832,000	24,547,000	25,283,000
Transfers	148,624	2,016,000	218,000	218,000	218,000
Proceeds Sale of Capital Assets	64,843	-	-	-	-
<b>Total Resources</b>	<b>\$ 182,229,801</b>	<b>\$ 184,928,973</b>	<b>\$ 206,906,987</b>	<b>\$ 209,110,987</b>	<b>\$ 218,054,987</b>
<b>Requirements</b>					
Personnel Services	\$ 85,825,130	\$ 98,643,000	\$ 112,316,000	\$ 115,685,000	\$ 119,156,000
Materials & Services	37,843,590	40,901,000	47,780,000	49,213,000	50,689,000
Transfers	17,285,060	4,220,000	7,240,000	6,040,000	6,040,000
Capital Outlay	2,085,891	10,254,000	5,400,000	867,000	897,000
Department Contingency	-	20,138,674	22,091,525	24,864,141	28,457,886
Unappropriated End Bal	39,190,130	10,772,299	12,079,462	12,441,846	12,815,101
<b>Total Requirements</b>	<b>\$ 182,229,801</b>	<b>\$ 184,928,973</b>	<b>\$ 206,906,987</b>	<b>\$ 209,110,987</b>	<b>\$ 218,054,987</b>

## Assumptions Used in all Forecasts

<b>Biennium 2027-2029</b>	
<b>Revenues</b>	
Property Taxes	3.5%
Utilities	2-4%
Other Revenue	3-4%
<b>Expenditures</b>	
Personnel Services	3%
Materials and Services	3%
Construction Cost	3.5%
<b>Biennium 2029-2031</b>	
Property Taxes	3.5%
Utilities	2-4%
Other Revenue	3-4%
Personnel Services	3%
Materials and Services	3%
Construction Cost	3.5%

# Street Fund Forecast BN2027-29 & BN2029-31

	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-2027 BN BUDGET	2027-2029 BN PROJECTION	2029-2031 BN PROJECTION
<b>Resources</b>					
Beginning Balance	\$ 7,667,709	\$ 10,056,670	\$ 14,042,712	\$ 8,076,712	\$ 5,124,712
Intergovernmental	7,854,409	7,622,000	8,055,000	8,297,000	8,546,000
Licenses and Fees	6,417,874	10,354,000	10,731,000	11,053,000	11,385,000
Miscellaneous Revenues	145,507	218,000	570,000	570,000	570,000
Transfers	12,875,060	4,000,000	6,000,000	6,000,000	6,000,000
Proceeds Sale of Capital Assets	12,888	-	-	-	-
<b>Total Resources</b>	<b>\$ 34,973,447</b>	<b>\$ 32,250,670</b>	<b>\$ 39,398,712</b>	<b>\$ 33,996,712</b>	<b>\$ 31,625,712</b>
<b>Requirements</b>					
Personnel Services	\$ 1,035,496	\$ 1,101,000	\$ 2,090,000	\$ 2,153,000	\$ 2,218,000
Materials & Services	6,434,680	7,763,000	8,981,000	9,250,000	9,528,000
Debt Service	1,593,150	1,593,000	1,596,000	1,594,000	1,598,000
Capital Outlay	12,906,138	16,430,000	18,655,000	15,875,000	14,625,000
Department Contingency	-	5,363,670	8,076,712	5,124,712	3,656,712
Unappropriated End Bal	13,003,983	-	-	-	-
<b>Total Requirements</b>	<b>\$ 34,973,447</b>	<b>\$ 32,250,670</b>	<b>\$ 39,398,712</b>	<b>\$ 33,996,712</b>	<b>\$ 31,625,712</b>

# Water Fund Forecast BN2027-29 & BN2029-31

	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-2027 BN BUDGET	2027-2029 BN PROJECTION	2029-2031 BN PROJECTION
<b>Resources</b>					
Beginning Balance	\$ 15,468,159	\$ 13,337,068	\$ 15,032,486	\$ 8,650,486	\$ 18,619,486
Intergovernmental	3,989,257	3,847,000	4,080,000	4,202,000	4,328,000
Sales and Services	29,784,241	28,820,000	30,468,000	31,077,000	31,699,000
Miscellaneous Revenues	431,398	510,000	660,000	660,000	660,000
Transfers	2,000,000	-	-	-	-
Other Financing Sources	58,769,077	-	-	19,000,000	-
<b>Total Resources</b>	<b>\$ 110,442,132</b>	<b>\$ 46,514,068</b>	<b>\$ 50,240,486</b>	<b>\$ 63,589,486</b>	<b>\$ 55,306,486</b>
<b>Requirements</b>					
Personnel Services	\$ 5,260,506	\$ 5,559,000	\$ 6,415,000	\$ 6,607,000	\$ 6,805,000
Materials & Services	12,189,218	14,320,000	15,800,000	16,274,000	16,762,000
Debt Service	70,158,200	11,642,000	10,430,000	10,089,000	9,732,000
Transfers	3,000,000	2,000,000	2,000,000	2,000,000	2,000,000
Capital Outlay	2,890,671	9,385,000	6,945,000	10,000,000	9,000,000
Department Contingency	-	3,608,068	8,650,486	18,619,486	11,007,486
Unappropriated End Bal	16,943,537	-	-	-	-
<b>Total Requirements</b>	<b>\$ 110,442,132</b>	<b>\$ 46,514,068</b>	<b>\$ 50,240,486</b>	<b>\$ 63,589,486</b>	<b>\$ 55,306,486</b>

# Sewer Fund Forecast BN2027-29 & BN2029-31

	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-2027 BN BUDGET	2027-2029 BN PROJECTION	2029-2031 BN PROJECTION
<b>Resources</b>					
Beginning Balance	\$ 21,013,046	\$ 24,946,332	\$ 20,422,705	\$ 24,602,705	\$ 25,518,705
Intergovernmental	5,923,000	2,096,000	-	-	-
Licenses and Fees	219,319	-	-	-	-
Sales and Services	33,339,380	35,881,000	39,011,000	40,532,000	42,113,000
Miscellaneous Revenues	278,581	500,000	600,000	600,000	600,000
Proceeds Sale of Capital Assets	24,605	-	-	-	-
<b>Total Resources</b>	<b>\$ 60,797,931</b>	<b>\$ 63,423,332</b>	<b>\$ 60,033,705</b>	<b>\$ 65,734,705</b>	<b>\$ 68,231,705</b>
<b>Requirements</b>					
Personnel Services	\$ 1,457,382	\$ 1,927,000	\$ 1,866,000	\$ 1,922,000	\$ 1,980,000
Materials & Services	14,548,008	22,257,000	17,951,000	18,490,000	19,045,000
Debt Service	11,249,025	11,254,000	13,257,000	13,249,000	13,255,000
Capital Outlay	8,984,037	23,000,000	2,357,000	6,555,000	6,000,000
Department Contingency	-	4,985,332	24,602,705	25,518,705	27,951,705
Unappropriated End Bal	24,559,479	-	-	-	-
<b>Total Requirements</b>	<b>\$ 60,797,931</b>	<b>\$ 63,423,332</b>	<b>\$ 60,033,705</b>	<b>\$ 65,734,705</b>	<b>\$ 68,231,705</b>

# Stormwater Fund Forecast BN2027-29 & BN2029-31

	2021-2023 BN ACTUAL	2023-2025 BN BUDGET	2025-2027 BN BUDGET	2027-2029 BN PROJECTION	2029-2031 BN PROJECTION
<b>Resources</b>					
Beginning Balance	\$ 2,108,781	\$ 3,863,521	\$ 7,896,768	\$ 6,828,768	\$ 7,268,768
Sales and Services	9,149,356	10,442,000	11,357,000	11,698,000	12,049,000
Miscellaneous Revenues	42,562	70,000	250,000	250,000	250,000
Transfers	570,000	-	-	-	-
<b>Total Resources</b>	<b>\$ 11,870,699</b>	<b>\$ 14,375,521</b>	<b>\$ 19,503,768</b>	<b>\$ 18,776,768</b>	<b>\$ 19,567,768</b>
<b>Requirements</b>					
Personnel Services	\$ 889,561	\$ 1,023,000	\$ 1,788,000	\$ 1,842,000	\$ 1,897,000
Materials & Services	3,463,061	4,172,000	4,647,000	4,786,000	4,930,000
Debt Service	453,250	231,000	-	-	-
Capital Outlay	1,903,665	5,100,000	6,240,000	4,880,000	4,460,000
Department Contingency	-	3,849,521	6,828,768	7,268,768	8,280,768
Unappropriated End Bal	5,161,162	-	-	-	-
<b>Total Requirements</b>	<b>\$ 11,870,699</b>	<b>\$ 14,375,521</b>	<b>\$ 19,503,768</b>	<b>\$ 18,776,768</b>	<b>\$ 19,567,768</b>

# Structure of Funds Subject to Appropriation - Descriptions

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## **GENERAL FUND**

This is the City's primary operating fund. It accounts for the financial operations which are not accounted for in any other fund. Principal sources of revenue are property taxes, charges for services from other funds, intergovernmental revenues, licenses and fees, and other miscellaneous revenues. Operations and expenditures included are:

- Police
- Fire
- Parks and Recreation
- Library
- Planning
- Adult Community Center
- Municipal Court
- Redevelopment
- City Council

## **ENTERPRISE FUNDS**

These funds are used to account for the acquisition, operation, and maintenance of activities that are similar to private businesses. They are entirely or predominately self-supported through user charges to customers. They are categorized as follows:

- Water - revenue is primarily from water service charges. It includes the Capital Reserve Water Fund.
- Sewer -revenue is primarily from sewer service charges.
- Stormwater - revenue is primarily from stormwater management charges. Addresses water quality and flooding.
- Tennis Facility -revenue is primarily from user fees.

## **OTHER AND SUPPORT FUND**

These are additional funds that serve various purposes but are not considered necessarily major funds.

- Street
- System Development charges
- Endowment Funds
- Bonded Debt City
- Building
- Capital Resereve
- Capital Reserve Water
- Parks Bond
- City/LORA debt service
- Public Art
- Tourism
- Trolley
- Assessment Project
- Bicycle Path

# Department Description and Goals

## **FIRE DEPARTMENT**

The Lake Oswego Fire Department provides emergency response to more than 50,000 citizens within the City of Lake Oswego and three adjoining contract districts (Lake Grove Rural Fire District, Riverdale/Dunthorpe Fire District, and Alto Park Water District).

Four fire stations are strategically located throughout Lake Oswego to provide rapid emergency service to citizens in need 24 hours a day.

Goals for the department include:

- Protect and Save
  - Perform operation duties including fire suppression, emergency medical services, rope rescue, hazardous materials response, pre-fire planning, dive and boat rescue, structural collapse, smoke alarm installation, wildland interface firefighting, fire and life safety inspections, and community outreach. Key performance indicators showcase the amount for a variety of department responses as well as how consistently expedient their response time is.
  - Oversee the City's Emergency Management Program
  - Coordinating and facilitating emergency planning, preparedness, response, and recovery activities
  - Responds as a Advanced Life Support (ALS) quick response unit together with American Medical Response (AMR) (private ambulance company)
- Fire Prevention
  - Work in partnership with businesses, neighborhood associations, residents, and other City departments to address fire and life safety risks identified within the service area
  - Enforcement of the State Fire Code, new construction plans review, fire cause investigation, home safety inspections, smoke alarm distribution, child car seat installations, and public education activities
  - Community training including Community Emergency Response Training (CERT)
- Department Training
  - Firefighters and medics are required to maintain and includes Fire Operations, Emergency Medical Services and Water Dive Rescue Training.

# Department Description and Goals

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## LIBRARY DEPARTMENT

The Lake Oswego Public Library began as two libraries: The Oswego Woman's Club opened its library in 1914, followed by the Oswego Library Association, in 1924. In 1930, the City of Oswego agreed to publicly fund a city library. The two volunteer libraries were merged and held 1,486 books and was located in City Hall, sharing space with the City Council

Now, the library continues to operate out of 27,000 square feet and strives to offer the best service and collection possible in the limited space. The library provides access to over 260,000 holdings, with an annual circulation rate of around 800,000 items borrowed each year. Per capita, the average Lake Oswego resident borrows more than 18 items each year, one of the highest rates in the nation. In the last fiscal year, library staff answered over 33,000 reference questions, and hosted over 300 events or classes with a total attendance of 16,485.

Goals for the department include:

- Inspire discovery and cultivate wellbeing by welcoming all people to read, learn, and connect
  - Providing a variety of services to assist all who utilize its services. Key performance indicators show case usage of the library in various aspects including holds, circulation, attendance, etc.
  - Hosting events to teach and inspire new topics of interest
  - Encourage the pursuit of knowledge with reading programs and contest for youth and adults
  - Providing a variety of media for consumption to allow all people to enjoy the library
- Accessible and Welcoming to all with equitable opportunities to thrive
  - Design and deliver diverse collections, programs, and resources for all ages
  - Eliminating racial and social equity barriers in programs, services, policies, and practices
  - Creating and maintaining an environment of diversity, inclusion, and respect both in our library systems and in all aspects of our community role
  - Ensuring that we are reaching and engaging disenfranchised people in the community and helping them express their voice
  - Serving as a convener and facilitator of conversations and partnerships to address community challenges
- Library Visioning Project
  - Improve the library with the input of the community for long-term support in meeting needs
  - Establish community values to assess improvements
  - Exploring service models for enhancing access, program offerings, and service delivery
  - Developing a strategic plan for the Library informed by the community visioning process

# Department Description and Goals

## PLANNING DEPARTMENT

Planning involves the consideration and balancing of many different factors and issues to make the best land use and growth management decisions for the community both for the short and long term. The department has three functional areas: Long Range Planning, Development Review, and Code Enforcement.

Planning works closely with Building, Engineering, and Fire in the review of development applications and building permits. Planning is also responsible for administering and maintaining the Lake Oswego Comprehensive Plan and Community Development Code, Tree Code, and Sign Code. Planning staff also administer the City's Annexation, Neighborhood Planning, Historic Preservation, and Urban and Community Forestry programs.

Goals for the department include:

- Neighborhood Enhancement
  - Providing grant funds to support the preservation of historical structures
  - Providing grant funds to support neighborhood associations with improving their community
  - Ensuring changes to the community are following local and state law to keep everyone safe. Key performance indicators showcase number of applications, annual reviews, and efficiency of the department
  - Encourage preservation of natural habitat with training
- Urban and Community Forestry
  - Bring together policies, practices, and plans for managing urban forest . Key performance indicators showcase number of tree related applications or permits annually.
  - Conduct public outreach, including a public survey, to establish baseline concerns and interest
  - Hold stakeholder meetings to facilitate change and feedback
- Long Range Planning
  - Maintain the preexisting plan for the city
  - Coordinate and evaluate policy decisions related to land use and transportation
  - Balance quality of life with regional policy coordination and compliance

# Department Description and Goals

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## **ADULT COMMUNITY CENTER DEPARTMENT**

The Lake Oswego Adult Community Center (ACC), a division of the Parks and Recreation Department, is a nonprofit service and advocacy organization located in the First Addition Neighborhood in Lake Oswego.

Generations of citizens in our community come to the Adult Community Center to have welcoming and transformational experiences. We enrich and excite adults with programs and classes that meet their needs and staff who create positive experiences for all.

Goals for the department include:

- Stewardship (Caring for People and the Environment)
  - Maintain accessible services for those who are homebound
  - Support citizens with a promise of confidentiality to support all issues
  - Facilitate support groups, home visits, and similar services. Key performance indicators showcase one service's impact by the number of meals served/delivered per year.
- Inspiring Connectivity
  - Provide a variety of programs to encourage community
  - Encourage use of support systems to engage clients
  - Host programs, workshops, trips, and health classes to connect similar interest individuals
- Creative Engagement
  - Host a TV show to empower clients to live life on their own terms
  - Provide tools and resources to support clients with their goals
  - Provide excellent service for all services for engagement big or small

# Department Description and Goals

## **MUNICIPAL COURT DEPARTMENT**

The Municipal Court is the judicial branch of Lake Oswego city government. It has jurisdiction over all violations of city and state laws committed within city limits other than felonies. The court does not handle civil or small claims cases.

The Municipal Court processes citations, reschedules arraignments, sets trials and maintains court records. The court collects and disburses fines, fees and assessments. It works cooperatively with the City Prosecutor, Clackamas County agencies, and the Oregon Department of Transportation.

Goals for the department include:

- Communication
  - Assist those in person with conduct, questions, and potential alternative methods of handling their violations
  - Provide information on the process from obtaining a citation to the resolution of the process
  
- Compliance
  - Maintain compliance with all laws, regulations, and requirements held by the city, county, state, and federal governments

# Department Description and Goals

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## **REDEVELOPMENT DEPARTMENT**

In 1979, the Lake Oswego City Council formed the Lake Oswego Redevelopment Agency (LORA) to manage urban renewal activities for the City, with initial focus on revitalization of a defined urban renewal district in the downtown area of Lake Oswego. Using tax increment financing and other public financing programs, LORA invests in projects and programs that enhance the business environment and stimulate private investment.

As described in the 2004 East End Redevelopment Plan Update, projects include public parks, trails and plazas, streetscape improvements, facade grants to improve existing commercial properties, and partnerships to facilitate and support private development of vibrant mixed-use projects.

Goals for the department include:

- Revitalize
  - Improve sites of interest with new structures and preservation of historical ones
  - Redevelop locations to better service the community
  - Acquire property for long term change
  
- Current Projects
  - North Anchor - The Redevelopment Agency is partnering with Urban Development and Partners to redevelop the site with a mix of uses including a boutique hotel, residential and retail.

# Department Description and Goals

## **CITY COUNCIL DEPARTMENT**

The Lake Oswego City Charter establishes a Council-Manager form of government, which vests policy authority in a volunteer City Council, and administrative authority for day-to-day operations in an appointed, professional City Manager.

The City Council is the governing body of the City of Lake Oswego, and the community elect members at large. The Mayor and Councilors are elected to four-year terms. The charter provides that the term of office for the Mayor and Councilors not exceed a period of eight consecutive years. At least three Council positions are up for election every two years. The three candidates who receive the highest number of votes are elected to the vacant seats.

Goals for the department include:

- Ensure a safe, secure, and prepared community
- Support business investment and job creation in Lake Oswego
- Foster a welcoming and inclusive community where all people have the opportunity to thrive and have equitable access to City Service
- Combat climate change and strengthen the community's resilience to climate impacts
- Strengthen public trust in the City through continuous improvement, outstanding customer service, infrastructure investments, and fiscal stewardship
- Invest in Lake Oswego's high-quality parks, natural areas, and recreational amenities
- Improve transportation connections, mobility and safety for all travelers and all types of trips in Lake Oswego
- Conserve the community's character, sense of place, and quality of life by planning for change and growth

# Department Description and Goals

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## **SEWER FUND**

Public Works Maintenance operates and maintains 206 miles of collection system with 13 major pump stations and 14 single-family pump stations. All of these assets eventually flow into the Tryon Creek Wastewater Treatment Plant operated by the City of Portland on Foothills Road. Public Works Maintenance also provides information about rodent control, sewer odor complaints, lateral service connection verification, response to sewer back-ups and overflows, and missing manhole covers.

Goals for the fund include:

- Teach the Public
  - Provide educational opportunities to educate proper disposal of waste products
  - Encourage safety from dumping areas, natural habitats, and health concerns
  - Effect of human waste on natural habitat such as rodent control and local rivers
  
- Quality Service
  - Building of a new wastewater treatment plant to accommodate population growth
  - Availability to service overflows, manhole covers, and verification of services
  
- Continuous improvement
  - Update the master plan to reflect changes in priority, completed projects, and priorities of the council
  - Set goals for capital improvement biennially within the budget

# Department Description and Goals

## **WATER FUND**

The City of Lake Oswego operates and maintains a Water Treatment Plant in West Linn, as well as a distribution system, a water conservation program, and a cross connection control program.

Water plays a vital role in everyone's life. The Water Department's mission is to bring healthy drinking water of the highest quality to Lake Oswego's residential and wholesale customers from the intake facility on the Clackamas River in Gladstone, all the way to their tap.

Goals for the fund include:

- Provide Quality Water
  - Provide educational opportunities to educate proper disposal of waste products
  - Encourage safety from dumping areas, natural habitats, and health concerns
  - Maintain accordance with state and federal regulations. Key performance indicators showcase gallons of drinking water produced and percent of quality standards met or exceeded.
  - Free lead and drinking water test kits made available
  
- Educate on Environmental impact
  - Provide resources on smart water and conservation
  - Explore new ways to improve the process to promote a healthy environment.
  - Answer questions on water sources and impact at the end of the cycle
  
- Quality Service
  - Updating rates to maintain current quality while also maintaining reasonable cost of living
  - Availability to service shutoffs, leaks, and water audits

# Department Description and Goals

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## **STREET FUND**

The Lake Oswego street system includes more than 181 miles of streets and 23.7 miles of pedestrian pathways. The streets are classified as major and minor arterials, major collectors, neighborhood collectors and local residential streets.

Goals for the fund include:

- **Maintain Current Infrastructure**
  - Clean street by striping, marking, and pothole repair along with street sweeping
  - Communicate traffic changes and planned road work ahead of time to assist citizens in their commutes around the city
  
- **Pavement Management Program**
  - Monitoring statistics on current and new pavement to maintain a high pavement condition index (PCI)
  - Provide ample communication of construction plans to limit public inconvenience
  - Continue the rehabilitation, repair, and installation of pavement
  
- **Enjoyment for Local Communities**
  - Provide a program to host block parties to encourage and allow community use of streets
  - Assist in fauna planning for street trees to be in compliance with local rules and provide shade, habitat, and beauty to the area

# Department Description and Goals

## **STORMWATER FUND**

Stormwater Management Utility plans, designs, constructs, maintains, administers all City Stormwater conveyances and facilities, and the regulations for its control, as well as establishes standards for design and construction.

Goals for the fund include:

- **Maintain Water Quality**
  - Provide educational opportunities to educate proper disposal of waste products
  - Encourage safety from dumping areas, natural habitats, and health concerns
  - Educate the importance of stormwater and the affects of human infrastructure
  
- **Green Infrastructure Strategy**
  - Prioritize green infrastructure per Department of Environmental Quality (DEQ) (<https://www.ci.oswego.or.us/publicworks/stormwater-facilitygreen-infrastructure-strategy>).
  - Educate public on green runoff solutions such as planters, swales, etc.
  - Reduce the impacts of stormwater and keep the lake, rivers and streams clean and healthy
  - Implementation began in 2024
  
- **Public Safety**
  - Assist in permit, plan, and report procurement
  - Ensure businesses are in compliance with city
  - Fine and contain illegal dumping in storm drainage systems
  - Committed to protecting the environment with erosion control

# Department Description and Goals

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## **SYSTEM DEVELOPMENT CHARGES FUND**

System development charges (SDC) are fees paid by new development to recover a portion of the cost of existing infrastructure and to help fund new infrastructure necessary to serve new development.

Infrastructure includes streets, the water system, sanitary and storm sewers, and parks.

There are no goals for this fund as the purpose of this fund is to track SDC moneys and projects.

## **ASSESSMENT PROJECT FUND**

This fund is related to sewer hookups and their financing. Due to the nature of this fund, no goals are present.

## **BICYCLE PATH FUND**

This fund is to track the City's highway fund state shared revenues to be used for bike paths. Due to the nature of this fund, no goals are present.

## **PARKS RECREATION CENTER FUND**

This intergovernmental project, a collaborative effort with the Lake Oswego School District, is part of the 2019 bond project that proposes a state-of-the-art recreation and aquatic center that includes a 12 lane competitive pool, a 4,500 square-foot recreational pool with three additional lanes for lap swimming, significant weight, and cardio area, a 7,250 square foot gym that will equip all types of activities and league play, locker rooms, multi-purpose group fitness rooms to hold education and outreach programs, and host events, along with a front desk for centralized check-in, including golf, scheduling and office space for staff.

Goals for the fund include:

- Customer Excellence
  - Hit targets for meeting expectation, value received, and recommendations
  - Distribute results to activity programmers and management to take action as needed
  
- Improve Diversity, Equity, and Inclusion
  - Provide lessons that help our community learn, work together, and celebrate all people
  - Strive to include multiculturalism, all levels of ability, all ages, all identities and genders

## Department Description and Goals

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### **BUILDING FUND**

This fund handles permits for individual, residential, and commercial needs. The City has joined the State of Oregon's full service e-permitting systems which allows for online applications, status updates, and schedule inspections. Due to the nature of this fund, no goals are present. Key performance indicators showcase annual activity for new homes, permits, and new commercial buildings.

### **PARKS BOND CAPITAL PROJECT FUND**

This fund tracks investment income and bond sale expenses. Due to the nature of this fund, no goals are present.

### **CITY/LORA DEBT FUND**

This fund tracks debt payments from the Urban Renewal Agency to pay back the city . Due to the nature of this fund, no goals are present.

### **BONDED DEBT FUND**

This fund tracks debt service payments towards current General Obligation (GO) Bonds and revenues. Due to the nature of this fund, no goals are present.

### **ACC ENDOWMENT FUND**

This fund tracks funds that are restricted for a certain purpose. No goals are present due to its nature.

### **LIBRARY ENDOWMENT FUND**

This fund tracks funds that are restricted for a certain purpose. No goals are present due to its nature.

### **CAPITAL RESERVE WATER FUND**

This fund tracks contributions toward future capital requirements of the water production system as agreed to under the LO-Tigard Water Partnership.

### **CAPITAL RESERVE FUND**

This fund tracks reserves for future capital projects that don't have their own fund. Due to the nature of this fund, no goals are present.

# Department Description and Goals

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## **TENNIS FACILITY FUND**

The Lake Oswego Indoor Tennis Center is a four-court facility open-year round to players of all ages and ability levels. The Tennis Center has been serving the community since 1974.

The Tennis Center is open to both Lake Oswego residents and non-residents. Courts are open every day of the year for hourly rental.

Throughout the year, Parks & Recreation offers tennis lessons for players of all abilities, ages five and up.

Goals for the fund are the same as Parks & Recreation Fund. Key performance indicators showcase number of annual useage.

## **TROLLEY FUND**

Learn about the Willamette Shore Line's historic past while enjoying a relaxing ride along the shore of the Willamette River. This scenic 10.5-mile roundtrip ride runs from Lake Oswego to Bancroft Street in SW Portland and features spectacular views plus several unique railroad attractions. Rides take about 90 minutes.

Goals for the fund are the same as Parks & Recreation Fund.

## **TOURISM FUND**

The fund tracks a portion of the City's local lodging taxes. These tax dollars can be used for the promotion and development of tourism and visitor programs for Lake Oswego. No goals are present due to its nature.

## **PUBLIC ART FUND**

The fund pays for the administration and maintenance of the City's Gallery Without Walls program and new art. No goals are present due to its nature.

# Department Description and Goals

## **ENGINEERING FUND**

The core purpose of the fund is to provide quality engineering services consistent with environmental values, safety standards and the needs of the community. They are committed to excellence in infrastructure management, planning, design and construction.

Goals for the fund include:

- Facilitate Project Completion
  - Monitor projects to be done timely, within budget, and the public is informed when lives will be effected.
  - Project and plan future priorities based on current status of all equipment and programs and new developments as they arise.
  
- Public Safety
  - Provide a form for communications of safety concerns
  - Promote involvement with Neighborhood Traffic Management Program
  - Process permits for construction, demolition, and traffic control

## **PUBLIC WORKS SUPPORT SERVICE FUND**

The fund is responsible for maintaining infrastructure systems throughout the City to ensure they are working correctly, efficiently, and that the life of our assets is maximized. Streets, Water, Sewer, Stormwater, Motor Pool and City Beautification maintenance programs make up the department with each responsible for their own infrastructure system.

Due to the nature of the fund, no goals are present.

# Department Description and Goals

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## **INFORMATION TECHNOLOGY DEPARTMENT**

The Information Technology (IT) department supports all city employees. They have limited interactions with the public. Due to the nature of this department, no goals are present.

## **FINANCE DEPARTMENT**

The Finance Department has the fiduciary responsibility to safeguard the City's financial assets and manage them in accordance with generally accepted accounting and financial management principles. The department's mission is to provide professional financial services to City Manager, Council, and City departments in order to promote fiscal stability and integrity.

Goals for the department include:

- Obtaining a 'clean' audit and internal control opinion from independent auditors. Key performance indicators note if the city obtained an unmodified audit opinion.
- Receive Government Finance Officers Association awards for audit and budget
- Maintain the highest credit ratings from Moody's and Standard & Poor's for a city this size
- Maintain financial policies to meeting governmental accounting principles and best practices
- Key performance indicators showcase number of passport applications reviewed, business license renewals/issues, and utility accounts as they are other services provided by the finance department.

## **CITY MANAGER'S OFFICE DEPARTMENT**

Pursuant to the Lake Oswego City Charter, the City Manager is appointed by the City Council to carry out council policies and to serve as chief administrative officer of the City. The City Manager manages the business of the City and implements the Council's plans and orders.

The City Manager is one of three appointed Charter Officers of the City of Lake Oswego. The two others are the City Attorney and Municipal Judge. Each serves at the pleasure of the Council and are appointed and removed by a majority of the entire Council.

## **FACILITIES MANAGEMENT DEPARTMENT**

Facilities Management provides a variety of support functions to the City organization and its facilities. These include the operation, maintenance and repair services of City Hall, as well as providing support services to other City-owned facilities operated by the other City Departments (i.e. ACC, Library, Fire Stations, etc.). No goals are present due to its nature.

# Department Description and Goals

## **CITY ATTORNEY'S OFFICE DEPARTMENT**

The City Attorney's Office provides legal advice and representation to the City of Lake Oswego. Legal services to the City include land use matters, public contracting, real estate transactions, labor and employment law, municipal finance, and general municipal law. The office also prosecutes misdemeanor crimes, city code violations, and state traffic offenses in the Lake Oswego Municipal Court.

## **HUMAN RESOURCES DEPARTMENT**

The department is responsible for providing a full-range of comprehensive human resources services and programs to the City that will provide leadership, act as a resource, enable the acquisition of a quality work force, provide training and development opportunities, and facilitate communication towards problem solving. Due to the nature of this department, no goals are present.

## **RISK MANAGEMENT DEPARTMENT**

The Risk Management program purchases insurance and researches contingencies to cover the City's potential liabilities for the following risk exposures: general liability, automobile and other vehicles, unemployment, and workers' compensation. The City's insured properties include reservoir sites, vehicles, residential homes, artwork, facilities, and equipment.

## **GENERAL - NON-DEPARTMENTAL**

This is a miscellaneous collection of budgets not attributed to specific agency operations that do not directly impact the agency services provided to the community.

# City Budget Resolution

## RESOLUTION 25-13

**A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF LAKE OSWEGO ADOPTING THE CITY OF LAKE OSWEGO BUDGET FOR THE BIENNIUM COMMENCING JULY 1, 2025, MAKING APPROPRIATIONS, LEVYING AD VALOREM TAXES, AND CLASSIFYING THE LEVY PURSUANT TO SECTION 11b, ARTICLE XI OF THE OREGON CONSTITUTION.**

**BE IT RESOLVED** by the City Council of the City of Lake Oswego that:

Section 1. The City Council hereby adopts the budget for the 2025-27 biennium in the sum of \$461,661,974. The budget is now on file at the Finance Department, City Hall, Lake Oswego, Oregon.

Section 2. The amounts listed below are hereby appropriated for the biennium beginning July 1, 2025 for the purposes stated.

### GENERAL FUND

General Administration	\$	29,411,781
Police		42,078,441
Fire		33,822,742
Parks & Recreation		35,961,051
Library		15,684,867
Planning		10,304,872
Adult Community Center		4,168,074
Municipal Court		3,215,614
Redevelopment		1,191,083
Nondepartmental		
Transfers to Other Funds		7,240,000
Contingency		11,749,000
Total Appropriations	\$	<u>194,827,525</u>

### PUBLIC WORKS:

#### Water Fund

Water Department	\$	29,160,000
Debt Service		10,430,000
Transfers to Other Funds		2,000,000
Contingency		8,650,486
Total Appropriations	\$	<u>50,240,486</u>

#### Sewer Fund

Sewer Department	\$	22,174,000
Debt Service		13,257,000
Contingency		24,602,705
Total Appropriations	\$	<u>60,033,705</u>

# City Budget Resolution

## **Street Fund**

Street Department	\$ 29,726,000
Debt Service	1,596,000
Contingency	<u>8,076,712</u>
Total Appropriations	<u>\$ 39,398,712</u>

## **Stormwater Fund**

Stormwater Department	\$ 12,675,000
Contingency	<u>6,828,768</u>
Total Appropriations	<u>\$ 19,503,768</u>

## **Public Works Support Services**

Operations Services Department	\$ 5,568,000
Contingency	<u>463,415</u>
Total Appropriations	<u>\$ 6,031,415</u>

## **Systems Development Charges Fund**

Systems Development Charges Department	\$ 8,500,000
Contingency	<u>10,160,199</u>
Total Appropriations	<u>\$ 18,660,199</u>

## **OTHER FUNDS:**

### **City/LORA Debt Service Fund**

Debt Service	<u>\$ 7,216,000</u>
Total Appropriations	<u>\$ 7,216,000</u>

### **Engineering Fund**

Engineering Department	\$ 12,168,000
Contingency	<u>503,638</u>
Total Appropriations	<u>\$ 12,671,638</u>

### **Building Fund**

Building Department	\$ 6,479,000
Contingency	<u>545,000</u>
Total Appropriations	<u>\$ 7,024,000</u>

### **Bonded Debt Service Fund**

Debt Service	<u>\$ 4,270,000</u>
Total Appropriations	<u>\$ 4,270,000</u>

# City Budget Resolution

## **Tennis Facility Fund**

Tennis Facility Department	\$ 1,028,000
Contingency	<u>224,216</u>
Total Appropriations	<u>\$ 1,252,216</u>

## **Tourism Fund**

Tourism Department	\$ 180,000
Transfers to Other Funds	436,000
Contingency	<u>335,585</u>
Total Appropriations	<u>\$ 951,585</u>

## **Trolley Fund**

Trolley	\$ 280,000
Contingency	<u>545,429</u>
Total Appropriations	<u>\$ 825,429</u>

## **Public Art Fund**

Public Art	<u>\$ 458,000</u>
Total Appropriations	<u>\$ 458,000</u>

## **ACC Endowment Fund**

Transfers to Other Funds	<u>\$ 150,000</u>
Total Appropriations	<u>\$ 150,000</u>

## **Library Endowments Fund**

Transfers to Other Funds	<u>\$ 68,000</u>
Total Appropriations	<u>\$ 68,000</u>

## **Capital Reserve Fund**

Capital Reserve	<u>\$ 1,200,000</u>
Total Appropriations	<u>\$ 1,200,000</u>

## **Summary Totals for All Funds**

Total Appropriations	\$ 424,782,678
Total Unappropriated and Reserves Amounts	<u>36,879,296</u>
<i>TOTAL ADOPTED BUDGET for 2025-27</i>	<u>\$ 461,661,974</u>

Section 3. BE IT RESOLVED that the City Council of the City of Lake Oswego hereby imposes the taxes provided for in the adopted budget, for fiscal years 2025-26 and 2026-27, at the rate of \$4.9703 per \$1,000 (inside LOSD) and \$4.5884 per \$1,000 (outside LOSD) of assessed value for operations; and imposes taxes for fiscal year 2025-26 in the amount of \$2,225,532 for bonds and for fiscal year 2026-27 the amount of \$2,231,915 for bonds, and that taxes are hereby imposed for 2025-26 and 2026-27 tax years upon the assessed value of all taxable property; and classified pursuant to the categories and subject to the limits of section 11b, Article XI of the Oregon Constitution as follows:

	<u>FY 2025-26</u>	<u>FY 2026-27</u>
Various Funds (general government-other than education):		
Inside Lake Oswego School District	4.9703	4.9703
Outside Lake Oswego School District	4.5884	4.5884
Debt Service Fund (excluded from M5 limitation)	\$2,225,532	\$2,231,915

Section 4. The City Manager or his designee shall certify, file with and give notice to the County Assessors of Clackamas County, Multnomah County and Washington County, Oregon and the Department of Revenue information as required by ORS 294.458 and 310.060.

Section 5. Effective Date. This Resolution shall take effect upon passage.

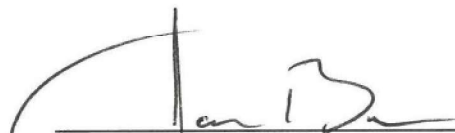
Adopted at a regular meeting of the City Council of the City of Lake Oswego held on the 3<sup>rd</sup> day of June, 2025.

AYES: Mayor Buck, Rapf, Afghan, Mboup, Wendland, Corrigan


NOES: None

ABSTAIN: None

EXCUSED: Verdick

  
 \_\_\_\_\_  
 Joseph M. Buck, Mayor

ATTEST:

  
 \_\_\_\_\_  
 Kari Linder, City Recorder

APPROVED AS TO FORM:

  
 \_\_\_\_\_  
 Ellen Osoinach, City Attorney





Glossary

## BUDGET GLOSSARY

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**ACCRUAL BASIS** – A basis of accounting in which revenues are recognized in the accounting period in which they are earned, and expenditures are recognized in the period in which they are incurred.

**ACTUAL** – Denotes revenue recognized or received or expenditure incurred or recorded totals for a given period, which is in contrast to “Budget” which denotes plans for a period.

**AD VALOREM TAX** – A property tax computed as a percentage of the value of taxable property. See “Assessed Value”.

**ADOPTED BUDGET** – The financial plan approved by the City Council, which forms a basis for appropriations. The final budget document includes Budget Committee and City Council revisions, is submitted to the State for filing, and becomes effective July 1<sup>st</sup>.

**APPROPRIATION** – The legal authorization granted by the City Council by resolution for expenditures and contingency, which permits the City to incur obligations and to make expenditures of resources during a fiscal year.

**APPROVED BUDGET** – The budget that the Budget Committee approves and recommends to the City Council for adoption.

**ASSESSED VALUE** – The lower of maximum assessed value or real market value set as a basis for imposing taxes. Exceptions exist for changed property and special provisions for specially assessed or partially exempt property.

**AUDIT** – A comprehensive examination as to the manner in which the government’s resources were actually utilized, concluding in a written report or opinion by a qualified auditing firm.

**AVERAGE MAXIMUM ASSESSED VALUE** – If the property is not specially assessed or partially exempt, the value determined by dividing the total maximum assessed value of all property in the same area in the same property class by the number of properties in the same area in the same property class. If the property is specially assessed or partially exempt, the amount is determined by dividing the total maximum assessed value of property in the area that is subject to the same exemption or special assessment program as the subject property by the total number of such properties in the area.

**AVERAGE REAL MARKET VALUE** – The value determined by dividing the total real market value of all property in the same area in the same property class by the number of properties in the same area in the same property class. For specially assessed or partially exempt property, the amount determined by dividing the total real market value of property in the area that is subject to the same exemption or special assessment program as the subject property by the total number of such properties in the area.

## BUDGET GLOSSARY

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**BALANCED BUDGET** – A balanced budget has “the total resources in a fund equal the total requirements for that fund”.

**BIENNIUM** – A period of two years. Effective July 1, 2002, cities and other districts in Oregon became allowed to adopt two-year budgets. The City of Lake Oswego had adopted a budget for the biennium every two years since its first one for the 2003-05 biennium. Then beginning with fiscal year 2009-10 the City returned to annual budgeting. Effective July 1, 2019, the City prepared a biennial budget.

**BOND** – A written promise to pay a specified sum of money on a specific date at a specified interest rate. Bonds are most frequently used to finance large capital projects, such as buildings and streets. The City currently has three types of bonds outstanding: General Obligation, Full Faith and Credit Bonds, and Revenue Bonds.

**BUDGET** – A document showing the City’s financial plan for one or two fiscal years (the City of Lake Oswego budgets on an annual fiscal year basis). By statute, it must include a balanced statement of resources and requirements for the previous two periods and estimated revenues and expenditures for the current and upcoming year.

**BUDGET CALENDAR** – The schedule of key dates which the City follows in the preparation and adoption of the budget.

**BUDGET COMMITTEE** – A fiscal planning board of a local government, consisting of the governing body (City Council) plus an equal number of appointed legal registered voters from the community (citizens). The Committee has legal authority to change any portion of the proposed budget and is responsible to pass the City's Approved Budget after a series of public budget deliberation meetings.

**BUDGET MESSAGE** – A written explanation prepared by the City Manager explaining the proposed budget, articulating the strategies to achieve the City’s goals, and identifying budget impacts and changes.

**BUDGET RESOLUTION** – The budget is adopted each year by the City Council through passage of a resolution. This budget resolution is the guiding document for compliance with budget law and for any necessary adjustments during the fiscal year.

**CAPITAL ASSET** – An asset costing \$10,000 or greater with a useful life of more than one year.

**CAPITAL BUDGET** – The City’s budget for projects, major repairs, and improvements or additions to the City’s fixed assets (streets, sidewalks, roads, sewers, stormwater, parks, and buildings).

## BUDGET GLOSSARY

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**CAPITAL IMPROVEMENT PLAN (CIP)** – An allocation plan for capital expenditures to be incurred over several future years. It sets forth each capital project, identifying the expected beginning and ending date for each project, the amount to be expended in each year, and the method of financing those expenditures.

**CAPITAL OUTLAY** – A category of expenditures which result in the acquisition of, or addition to, the City's fixed assets. They generally have a useful life of one or more years, such as machinery, land, furniture, equipment, or buildings. The City's capitalization threshold is currently \$10,000 per item.

**CAPITAL PROJECTS FUND** – A Fund used to account for resources, such as Bond sale proceeds, and expenditures to be used for major capital item purchase or construction.

**CARES ACT**– Coronavirus Aid, Relief, and Economic Security Act passed by U.S. Congress as an economic stimulus bill in response to economic fallout as a result of COVID-19 pandemic.

**CHARGES FOR SERVICES** – Represents administrative and other services provided to other City departments. They also include Work Order revenue for capital project planning and management by City staff.

**CIP** – Capital Improvement Plan.

**CITY COUNCIL** – The legislative branch of the City composed of seven elected officials who serve a four-year term.

**ANNUAL COMPREHENSIVE FINANCIAL REPORT (ACFR)** – The complete annual financial report of the City that is prepared in conformity with generally accepted accounting principles. An independent auditing firm audits the financial statements in this annual report.

**CONTINGENCY** – An appropriation of funds to cover unforeseen events and emergencies, which may occur during the budget period. City Council must authorize the use of any contingency appropriations.

**CONTRACTUAL SERVICES** – The costs related to services performed for the City by individuals, business, or utilities.

**COVID-19** – Coronavirus disease 2019 is a contagious disease caused by a virus that became a pandemic in 2020.

**DEBT SERVICE** – Payment of principal and interest related to long-term debt. The City's debt service payments can be reviewed in the Bonded Debt Service Fund.

## BUDGET GLOSSARY

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**DEBT SERVICE FUND** – A fund established to finance and account for the payment of interest and principal on all general obligation debt, serial and term, other than that payable exclusively from special assessments and revenue debt issued for, and serviced by, a governmental enterprise fund.

**DEBT SERVICE LEVY** – A tax imposed by local governments for the repayment of voter-approved general obligation or limited tax bonds. This levy is limited to the repayment of principal and interest necessary to retire these voter-approved bonds.

**DEPARTMENT** – A major administrative organizational unit of the City which indicates overall management responsibility for one or more divisions.

**DEPRECIATION** – Expensing the cost of a capital asset over its useful life.

**DEVELOPMENT CODE AND STANDARDS** – The City’s procedures and criteria for the review and approval of land development proposals.

**DIVISION OF TAXES** – Division of taxes refers to the process of, and revenue from, apportioning tax to urban renewal agencies based on the relationship of the “excess” to “frozen value” (i.e. tax increment revenue). The urban renewal agency of the City is The Lake Oswego Redevelopment Agency, commonly known as LORA.

**DOUBLE MAJORITY** – A term that refers to an election where at least 50% of the registered voters eligible to vote in the election cast a ballot and more than 50% voting on the measure approve. (*Any March or September election.*) The voter turnout requirements do not apply at a general election held in November of an even-numbered year, as approval of a measure at a general election is considered to meet the “double majority” requirement by definition.

**EMPLOYEE BENEFITS** – Contributions made by a government to meet commitments or obligations for employee related expenses. Included is the government’s share of costs for social security and the various pensions, medical, dental, life insurance, workers’ compensation, and disability insurance.

**ENCUMBRANCE** – The commitment of appropriated funds to purchase an item or service. To encumber means to set aside funds in the form of purchase orders or contracts and commit funds for a future expenditure. Obligations cease to be encumbrances when paid.

**ENDING FUND BALANCE** – As shown in the budget, an amount representing the difference between the resources received by the fund compared to the amount expended in the fund. This becomes the subsequent year’s beginning working capital or beginning fund balance.

## BUDGET GLOSSARY

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**ENTERPRISE FUND** – A fund established to account for operations in a manner similar to private business enterprise, in that, the costs of providing services to the general public on a continuing basis are recovered primarily through user charges. They are usually self-supporting. The City's enterprise funds are Water, Sewer, Stormwater, Golf Course, and Tennis Facility Funds.

**EOC (EMERGENCY OPERATIONS CENTER)** – Command center for coordination and intervention for citywide or regional emergencies.

**ESTIMATED REVENUE** – The amount of projected revenues to be collected during the fiscal year.

**EXPENDITURE CONTROL BUDGETING** – Expenditure Control Budgeting is based on the premise that managers are paid to manage, and it changes some of the rules of the game that have undermined traditional governmental budgeting systems. Briefly put, expenditure control budgeting gives department managers a great deal of flexibility over individual line items, as long as they remain within the "bottom line." The focus is on stretching limited resources as far as possible to provide as much service as possible.

**EXPENDITURES** – A decrease in the financial resources of the City due to the procurement of goods and services. They include current operating expenses, which require the current or future use of net current assets, debt services, and capital outlays.

**FINANCIAL AUDIT** – A comprehensive examination of the accounting and financial information by a qualified auditing firm. The auditing firm examines whether funds are spent according to intended purpose, within appropriations, and as authorized. It also examines if revenues, expenses, assets and liabilities are stated fairly and if internal procedures and policies are appropriate to prevent misuse and followed. The auditing firm reports to the City Audit Committee. See also Performance Audit and Internal Audit.

**FISCAL YEAR (FY)** – A twelve-month period to which the annual budget applies. At the end of the fiscal year a government determines its financial position and the results of its operations (July 1 through June 30 is required for municipalities in the State of Oregon).

**FRANCHISE FEE** – A fee paid by businesses for use of City streets, alleys, and/or property in providing their services to the citizens of a community. Services requiring franchises include electricity, telephone, natural gas, waste collection, and cable television.

**FULL FAITH AND CREDIT BONDS (FFC)** – Full faith and credit bonds are for long-term obligations that are payable solely from a designated source of revenue. They do not carry any taxing power.

**FULL-TIME EQUIVALENT (FTE)** – Staffing levels are measured in FTE's to give a consistent comparison from year to year. One full-time position filled for the entire year equals one FTE; however, in some instances a FTE may actually consist of several part-time positions.

## BUDGET GLOSSARY

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**FUND** – An independent grouping of accounts that are self-balancing by, recording cash and/or resources together with all related liabilities, obligations, reserves, and equities. Funds are segregated for the purpose of carrying on specific activities or attaining certain objectives.

**FUND BALANCE** – The budget amount available in a particular fund at a certain period of time.

**GAAP, GENERALLY ACCEPTED ACCOUNTING PRINCIPLES** – Generally accepted accounting principles are conventions, rules, and procedures used in performing accepted accounting practice at a particular time.

**GASB, GOVERNMENTAL ACCOUNTING STANDARDS BOARD** – The Governmental Accounting Standards Board is the body that establishes accounting principles for state and local governments.

**GENERAL FUND** – The general operating fund of the City. It is used to account for all financial resources except those required to be accounted for in another fund.

**GENERAL OBLIGATION BONDS** – General obligation bonds are long-term obligations backed by the “full faith and credit” pledge of the city’s general fund revenues. They carry an unlimited taxing power, require voter-approval, and are limited in total to 3% of the city’s true cash value. The City currently has four general obligation bond issues outstanding listed in detail in the financial trends section of the budget.

**GFOA, GOVERNMENT FINANCE OFFICERS ASSOCIATION** – The Government Finance Officers Association is the premier association of public-sector finance professionals and is dedicated to providing high-quality support to state and local governments. Annually, the City applies for two distinguished GFOA awards: *Certificate of Achievement for Excellence in Financial Reporting* (for the audit), and *The Distinguished Budget Presentation Award*.

**GIS** – Geographic Information System program facilitates the efficient management of spatial information; offering enhanced analytical, cartographic, and reporting capabilities for internal and external customers.

**GOALS** – General statements of each division’s desired social or organizational outcomes.

**GOVERNMENTAL FUND** – Funds used to account for the acquisition, use and balances of current expendable financial resources and the related current liabilities – except those accounted for in proprietary funds and fiduciary funds.

**GOVERNING BODY** – City council, county court or board of commissioners, school board, board of trustees, board of directors, or other managing board of a local government unit.

**GRANT** – A contribution by one governmental unit to another. The contribution may be made to aid in the support of a specified purpose or function or general purpose.

## BUDGET GLOSSARY

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**INFRASTRUCTURE** – Substructure or underlying foundation of the City (e.g. streets, utility lines, bridges, sidewalks, etc.).

**INTERGOVERNMENTAL REVENUES** – Revenues received from another governmental entity, such as county, state, or federal governments.

**INTERNAL AUDIT** – A comprehensive review of management, financial, or other policies and procedures. It is a peer review, and the internal audit firm reports to City Management. An internal audit often includes recommendations for improvement, operationally, procedurally, and financially. See also Financial Audit and Performance Audit.

**INTERNAL FEES FOR SERVICE** – Internal Fees for Service covers general administrative services, insurance, repair and maintenance services by public works motor pool, and maintenance services provided by Parks. Prior to fiscal year 2013-14, these were categorized as Transfers.

**INTERNAL SERVICE FUND** – A fund established to finance and account for services and commodities furnished by a designated department to other departments within a single governmental unit or to other governmental units.

**LAKE OSWEGO REDEVELOPMENT AGENCY (LORA)** – The Lake Oswego Redevelopment Agency (LORA) is the urban renewal agency of the City. The East End District was formed in 1986 to conduct redevelopment activities within a 146 acre downtown district at the east end of the City. In 2012, the 159 acre Lake Grove District was formed along the Boones Ferry Corridor on the west end of the City. Resources are derived primarily from debt financing, which is repayable by property tax increment revenues and interest on investments.

**LEVEL OF SERVICE** – The amount and type of existing services, programs, and facilities provided. Level of service depends on the available resources.

**LEVY** – The amount of ad valorem tax certified by a local government for the support of governmental activities.

**LINE ITEM** – An expenditure description at the most detailed level. Also called Object of Expenditure. Operating expenditures are tracked through the use of line items. Line items itemize expenditures into specifics, such as equipment repair or printing. Line items usually are further aggregated into spending categories.

**LOCAL BUDGET LAW** – Oregon Revised Statute (ORS) 294.305 to 294.565. Local Budget Law has several purposes: 1) establish standard procedures for presenting a local government budget; 2) outline programs and services provided; 3) provide a standard method for estimating revenues, expenditures, and proposed tax levies; and 4) encourage citizen involvement in the preparation of the budget before formal adoption.

## BUDGET GLOSSARY

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**LOCAL GOVERNMENT** – Any city, county, port, school district, community college, public or quasi-public corporation (including a municipal utility) operated by a separate board or commission; a municipal corporation or municipality.

**LOCAL OPTION TAX** – Voter approved taxing authority (by double majority) that is in addition to the taxes generated by the permanent tax rate. Local option taxes can be for general operations, a specific purpose or capital projects. They are limited to 5 years, but may extend to 10 years for a capital project, then they are limited to the useful life of the project or 10 years, whichever is less. These levies do not become part of the permanent rate limit.

**LOSD, LAKE OSWEGO SCHOOL DISTRICT** – Abbreviation for the school district in Lake Oswego.

**MATERIALS AND SERVICES** – Expendable materials, operating supplies, and services necessary to conduct departmental activity.

**MAJOR FUND** – Is a fund that represents a government’s most important funds by mathematical means and by officials’ belief that a fund is important to financial users.

**MEASURE 5** – A constitutional tax rate limitation passed by the voters in 1990 which restricts the amount an individual property can be taxed. Measure 5 limits school taxes to \$5 per \$1,000 of ‘real market value’. All other general government taxes are limited to \$10 per \$1,000 of ‘real market value’.

**MEASURE 50** – In 1997, Oregon citizens approved an amendment to the State Constitution (Measure 50) which limits the ability of state and local governments to levy property taxes, impose certain types of charges and issue certain types of debt. Measure 50 reduced every property’s 1995-96 assessed value by 10%, and also limited the amount of annual growth of the assessed value to 3%. Measure 50 also established permanent rate limitations for each taxing district in the state based on the current year tax in 1997, and then reduced 13% for most districts.

**MODIFIED ACCRUAL BASIS OF ACCOUNTING** – The accrual basis of accounting adapted to governmental funds where revenues are recognized when they become both “measurable” and “available to finance expenditures of the current period.” Expenditures are generally recognized when the related fund liability is incurred.

**MS4** – Municipal Separate Storm Sewer System.

**MUNICIPALITY** – See “Local Government”.

**NEIGHBORHOOD ASSOCIATION** – A group of people organized and recognized by the Council within a geographical area for the purpose of acting on issues affecting neighborhood and community livability.

## BUDGET GLOSSARY

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**NON-MAJOR FUND** – A fund where special purpose activities are accounting for. This includes special revenue funds, capital project funds, internal service funds, and smaller scale enterprise funds.

**OBJECT CLASSIFICATION** – A grouping of expenditures, such as personnel services, materials and services, capital outlay, debt services, and other types of requirements.

**OBJECTIVES** – A specific, measurable and observable result of an organization’s activity which advances the organization toward a goal.

**ODOT** – Oregon Department of Transportation.

**OPERATING BUDGET** – The portion of the budget that pertains to daily operations providing basic governmental services. The operating budget contains appropriations for such expenditures as personal services, supplies, utilities, materials, and debt service.

**OPERATING RATE** – The rate determined by dividing the city’s operating tax amount by the estimated assessed value of the city. This rate is determined when a city wants to impose less tax than its permanent rate will raise.

**ORDINANCE** – Written directive or act of a governing body. Has the full force and effect of law within the local government’s boundaries, provided it does not conflict with a state statute or constitutional provision. See “Resolution”.

**ORS** – Oregon Revised Statutes.

**PCI** – Pavement Condition Index.

**PERFORMANCE AUDIT** – A comprehensive review of outcomes as they compare to goals and inputs. It assesses efficiency and effectiveness and is a management tool. See also Financial Audit and Internal Audit.

**PERMANENT RATE LIMIT** – The maximum tax rate of ad valorem property taxes that a local government can impose, calculated under the limitations of Measure 50. Taxes generated from the permanent rate limit can be used for any purpose. No action of a local government or its voters can increase or decrease a permanent rate limit. The City of Lake Oswego has two permanent tax rates limits. For city residents living inside the Lake Oswego School District (LOSD), it is 5.0353 per \$1,000 of assessed value and, for city residents living outside of LOSD, it is 4.5884 per \$1,000 of assessed value.

**PERS** – The State of Oregon Public Employees Retirement System (PERS) is the retirement program for about 95 percent of state and local government employees in Oregon.

**PERSONNEL SERVICES** – Expenditures including wages and benefits of a government’s employees.

## BUDGET GLOSSARY

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**PROPERTY TAXES** – A tax that uses assessed property value as the base by which the cost burden of local services is determined. These are certified by the county assessor’s office.

**PROPERTY TAX ACCOUNT** – Administrative account number used for the purpose of listing property tax on the assessment roll.

**PROPOSED BUDGET** – Financial and operating plan proposed by the budget officer, submitted to the public and budget committee for review.

**PUBLIC FACILITY PLAN** – A planning document mandated by Oregon Administrative Rule chapter 11 and administered by the Department of Land Conservation and Development.

**REAL MARKET VALUE (RMV)** – The amount in cash that could reasonably be expected to be paid by an informed buyer to an informed seller, each acting without compulsion in an arm’s length transaction / occurring as of the assessment date for the tax year, as established by law.

**REQUIREMENT** – The total of all expenditures within a fund, including operating expenditures, transfers to other funds, contingency, and unappropriated fund balance.

**RESERVE FOR FUTURE EXPENDITURE** – An amount budgeted, but not appropriated, that is not anticipated to be spent in the fiscal year, but rather carried forward into future fiscal years. These funds may be spent with approval by the city council by resolution.

**RESERVE FUND** – Established to accumulate money from year to year for a specific purpose, such as purchase of new equipment.

**RESOLUTION** – An order of a governing body. Requires less legal formality and has lower legal status than an ordinance. Statutes or charter will specify which actions must be by ordinance and which may be by resolution (for cities, revenue-raising measures such as taxes, special assessments, and service charges always require ordinances). See “Ordinance.”

**RESOURCES** – Total amount available for appropriation, consisting of estimated beginning funds on hand plus anticipated revenues.

**REVENUE BONDS** – Revenue bonds are long-term obligations that are payable solely from a designated source of revenue generated by the project which was financed. No taxing power or general fund pledge is provided as security.

**REVENUES** – Monies received or anticipated by a local government from either tax or nontax sources.

## BUDGET GLOSSARY

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**SPECIAL LEVY** – A special levy is an ad valorem tax, imposed for an urban renewal plan area. It is not a result of a division of tax but rather imposed directly for the plan area and is attributed specifically to urban renewal on the tax statement, unlike the division of tax amount. Currently, the City’s urban renewal agency has no special levy in effect.

**SPECIAL REVENUE FUND** – A fund used to account for the proceeds of specific revenue sources (other than special assessments, expendable trusts, or major capital projects) that are reserved for specific purposes.

**STATE SHARED REVENUE** – Revenues received from the State of Oregon from cigarette, liquor, and highway taxes under ORS 221. These funds are available to cities located in counties with at least 100,000 inhabitants that provide at least four types of municipal services.

**STATE REVENUE SHARING** – A share of certain revenues from the State of Oregon that are apportioned among and distributed to cities for general purposes. These funds require a public hearing before the budget committee to discuss possible uses.

**SUPPLEMENTAL BUDGET** – A supplemental budget is a budget adjustment to fund unexpected needs or to spend revenues not anticipated at the time the regular budget was adopted. It cannot be used to authorize additional taxes.

**SYSTEM DEVELOPMENT CHARGE (SDC)** – A charge levied on new construction to help pay for additional expenses created by growth. SDCs are for construction and expansion, and may not be used for maintenance of infrastructure.

**TAX INCREMENT FINANCING** – A financial mechanism for urban renewal plans which captures the tax from the growth in property value within a designated geographical area. The City’s urban renewal plans, as carried out by the Lake Oswego Redevelopment Agency or LORA, cover approximately 305 acres of the city.

**TAX LEVY** – The total amount of taxes imposed by the City on taxable property, as determined by the appraisers for Clackamas, Multnomah, and Washington counties.

**TAX RATE** – The tax rate discussed by the budget committee and set by the City Council. It is made up of two components: operations and debt service. It is usually expressed as a rate for each \$1,000 of assessed value of taxable property.

**TAX YEAR** – The fiscal year from July 1 through June 30.

**TRANSFERS** – Amounts distributed between funds to finance activities in another fund. These are shown as expenditure in the originating fund and revenue in the receiving fund.

## BUDGET GLOSSARY

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**UNAPPROPRIATED ENDING FUND BALANCE** – Amount set aside in the budget for carryover to the following budget period providing the local government with needed cash flow until other money is received (typically in November). This amount cannot be transferred by resolution or used through a supplemental budget, unless necessitated by a qualifying emergency.

**UNIT OF PROPERTY** – For purposes of Measure 50, “property” and “unit of property”, except for centrally assessed utility property, means all property included within a single property tax account.

**WORK ORDER CHARGES** – This is revenue for capital project planning and management by City staff.

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For more detailed budget information go to our website  
[www.lakeoswego.city/finance/city-budget](http://www.lakeoswego.city/finance/city-budget)

# Lake Oswego Police Department

2021 Annual Reporting



# Sworn Department Staff



The Lake Oswego Police Department has 48 sworn Police Officers broken up into 4 divisions.

*NOTE: 8 Officers currently in training*

## Patrol (35)

- Patrol Lieutenant
- Patrol Sergeants
- Patrol Officers
- Training Officers
- Admin Sergeant

## Traffic (5)

- Traffic Sergeant
- Motor Officers
- SROs

## Investigations (5)

- Detective Sergeant
- Detectives
- ARO

## Admin (3)

- Chief
- Captain
- Admin Lieutenant



# Non-Sworn Department Staff

The Lake Oswego Police Department has 26.5 non-sworn staff.

*NOTE: 1 CSO currently in training*



## LOCOM (16.5)

- Comm. Manager
- Comm. Supervisor
- Comm. Operators

## Records (3)

- Records Supervisor
- Records Personnel

## CSOs (4)

- Reside in Traffic Div.



## Admin (3)

- BHS
- Chief Assistant
- Evidence Tech.



# Incidents in 2021

## Total Incidents in 2021: 23,405

Total Incidents are comprised of Calls for Service (CFS) and Self-Initiated Activity (S-INIT). There were more than 2,100 incidents in 2021 as compared to 2020 (+ 9.89%).

The Patrol Division is typically responsible for the **Calls for Service (CFS)** that come from our community. CFS include such things as criminal investigations, responding to safety issues, special events/duties, and general patrol activities related to crime deterrence/investigations.

**CFS – 17,311**

**Self-Initiated Activity (S-INIT)** is primarily comprised of traffic stops and pedestrian stops. This activity typically occurs within the patrol and traffic divisions.

**S-INIT – 6,094 (traffic stops)**



# Incidents Per Officer

Incident per Officer is based on total Incidents (23,405) divided by 37 Officers as there are some sworn department members that don't typically respond at the moment an incident is occurring (e.g. Admin and Training groups).

*\* While patrol staffing has increased, many officers are still in training and not released to solo status yet.*

**Incident per Officer in 2021: 632 (+9.9%)**





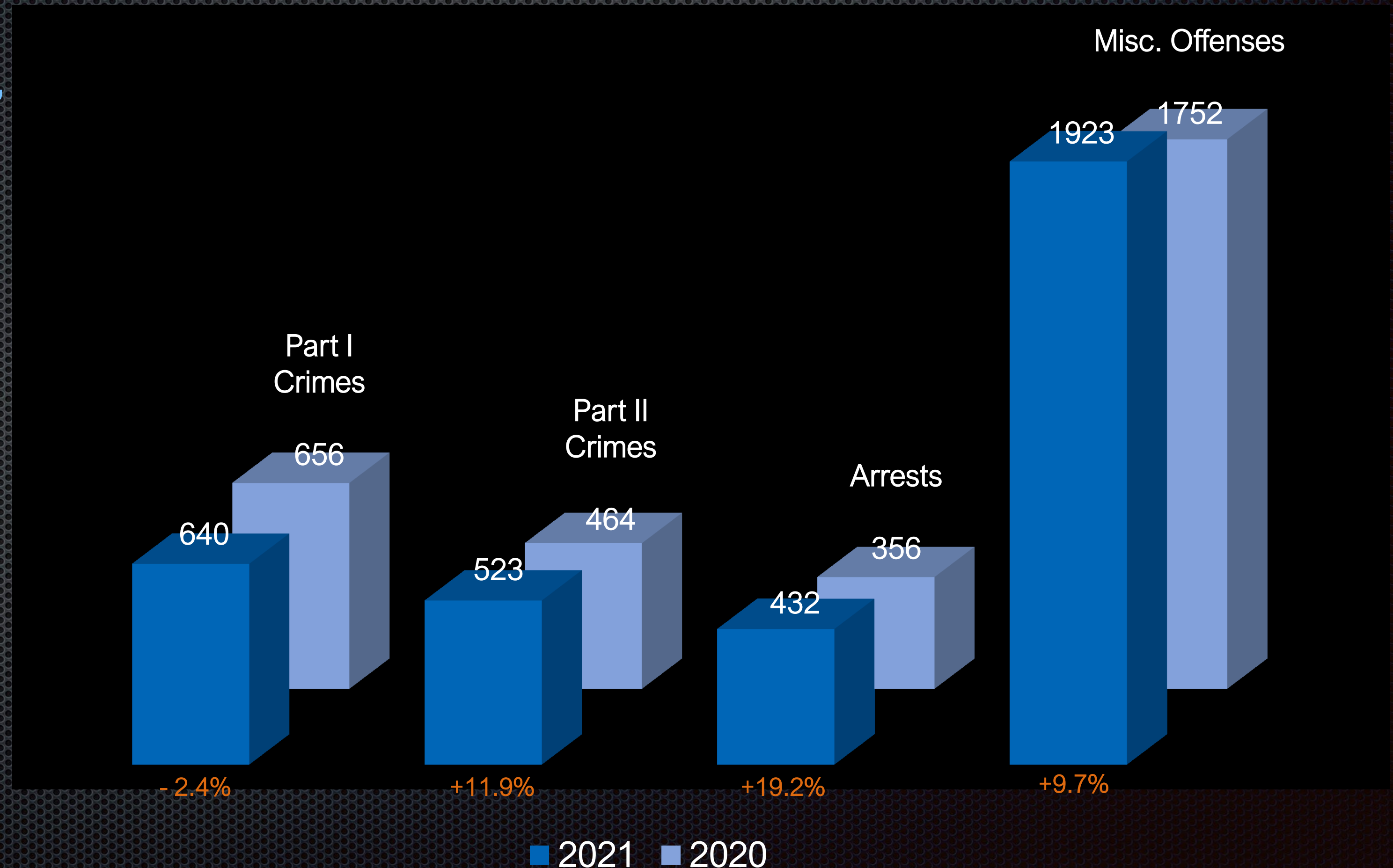
# Calls for Service

In 2021, there were 17,311 Calls for Service (CFS) resulting in 3,712 case numbers taken across Part I and Part II crimes, crashes, alarms, arrests, and misc. offenses

Part I Crimes Include: Homicide, Rape, Robbery, Aggravated Assault, Burglary, Larceny, Vehicle Theft, and Arson.

Part II Crimes Include: Simple Assault, Forgery, Fraud, Embezzlement, Stolen Property, Vandalism, Weapons Laws, Prostitution, and Sex Crimes.

Misc. Offenses/Activity Include: Alarms, DHS cases, DUII, Property calls, Suspicious Activity, Welfare Checks, and similar calls for service.

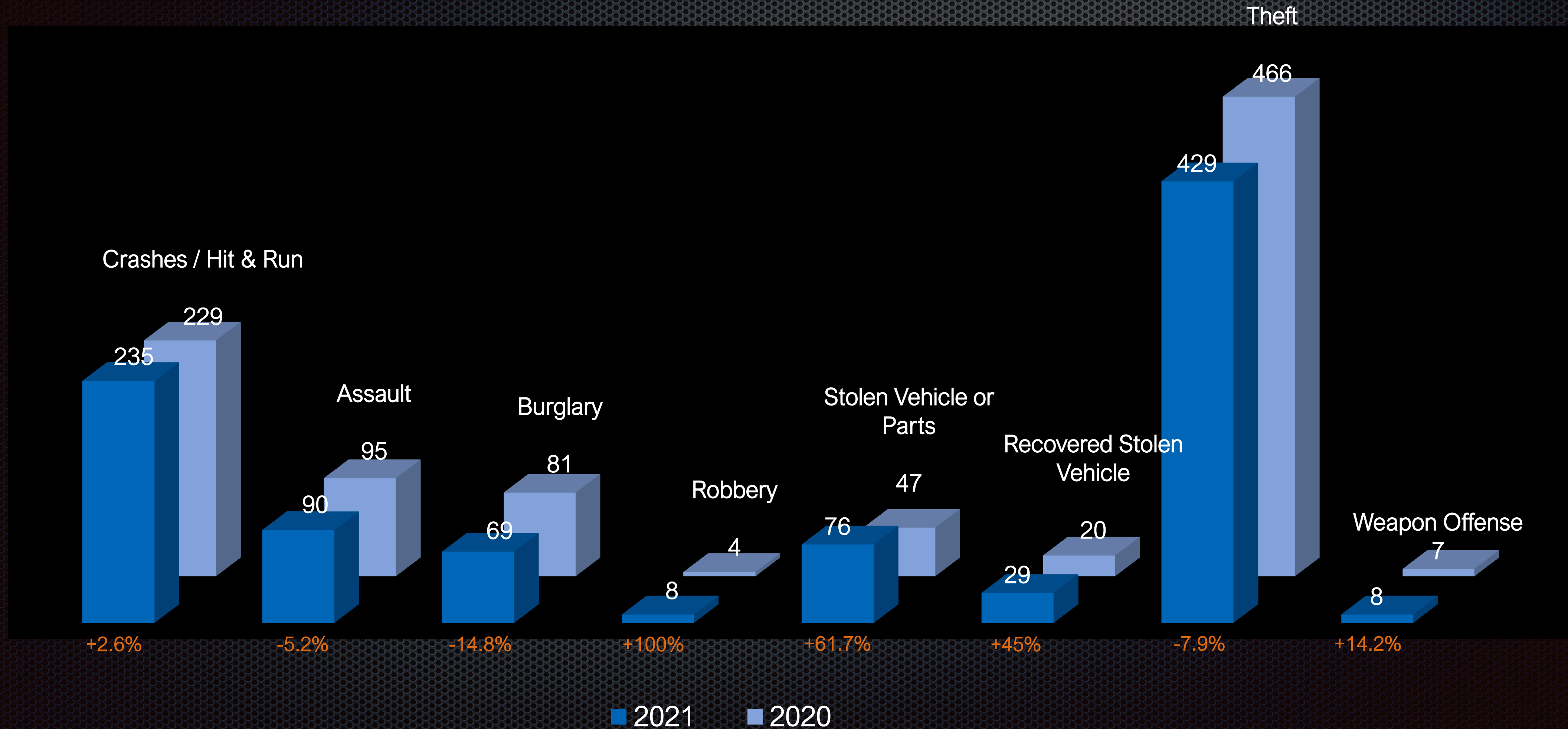




# Noteworthy Calls for Service

Specific offense types are noted for cases taken in 2021 and 2020. Many offenses overlap with other reported crimes adding to the complexity of the investigation.

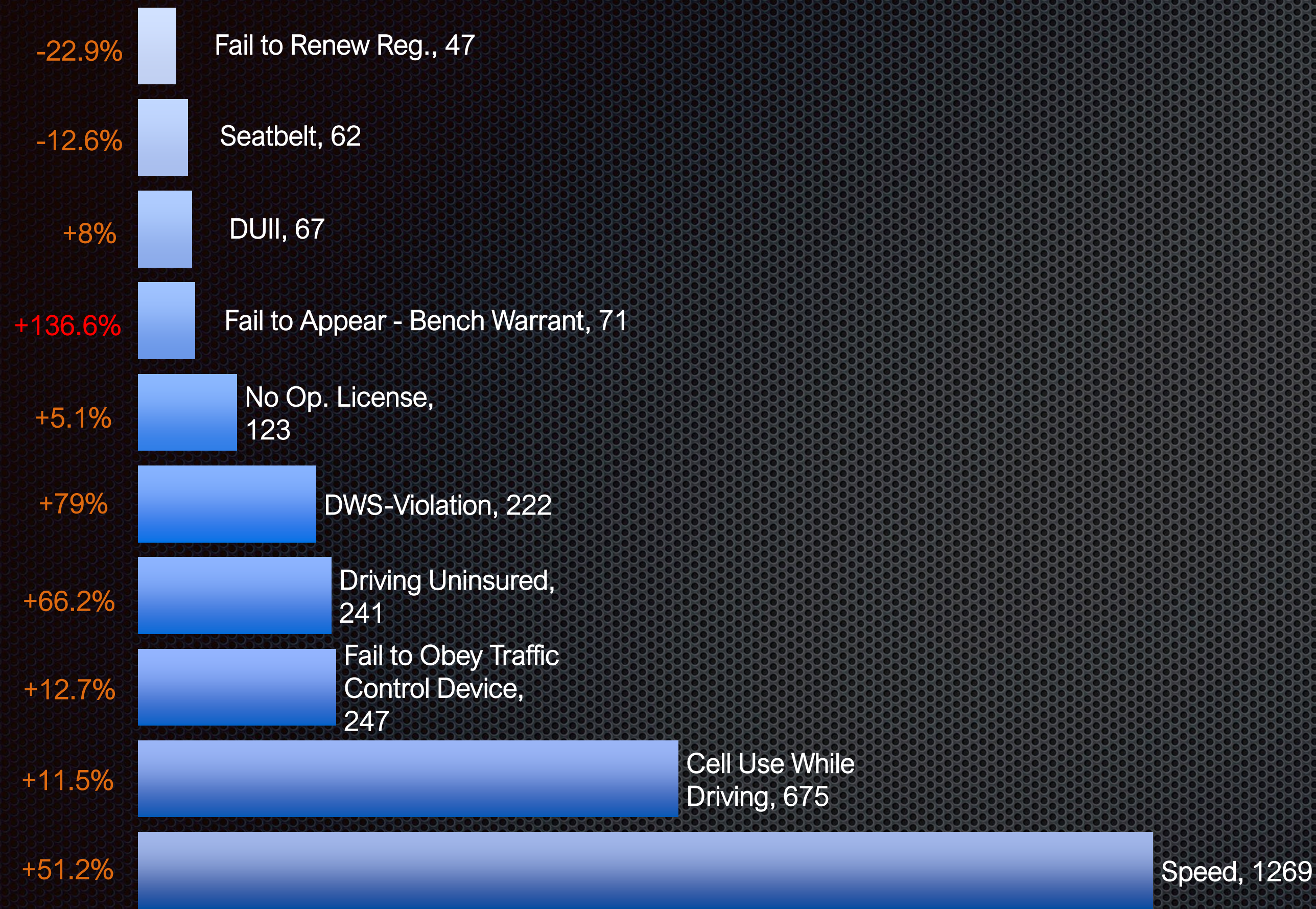
*\*This list is not inclusive of all offenses LOPD responded to or investigated; many incidents do not result in a case number.*



# Traffic Citations

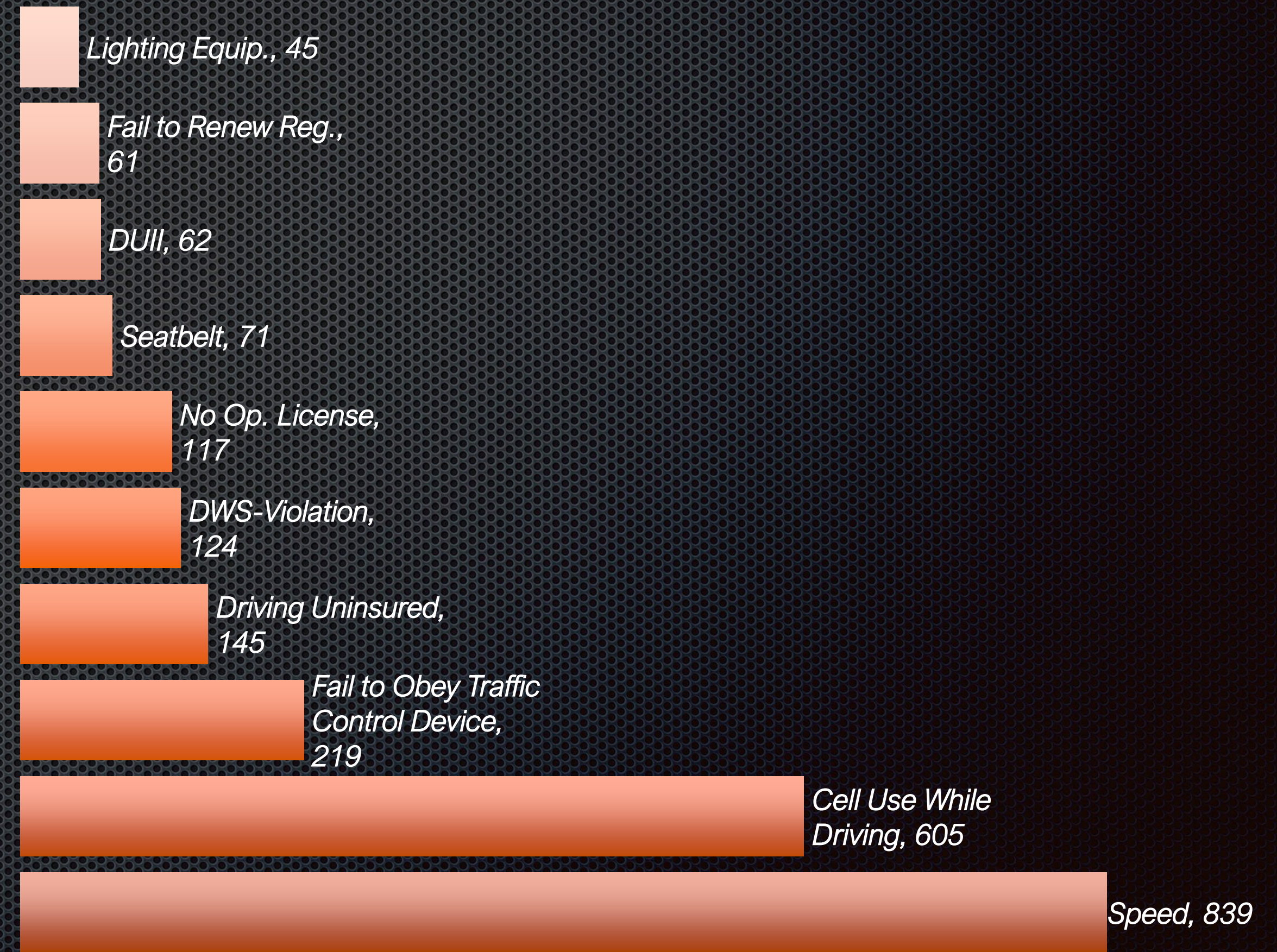


## 2021 – Top 10 Violations Cited



2021: 3,706 violations cited on 3,288 tickets

## 2020 – Top 10 Violations Cited



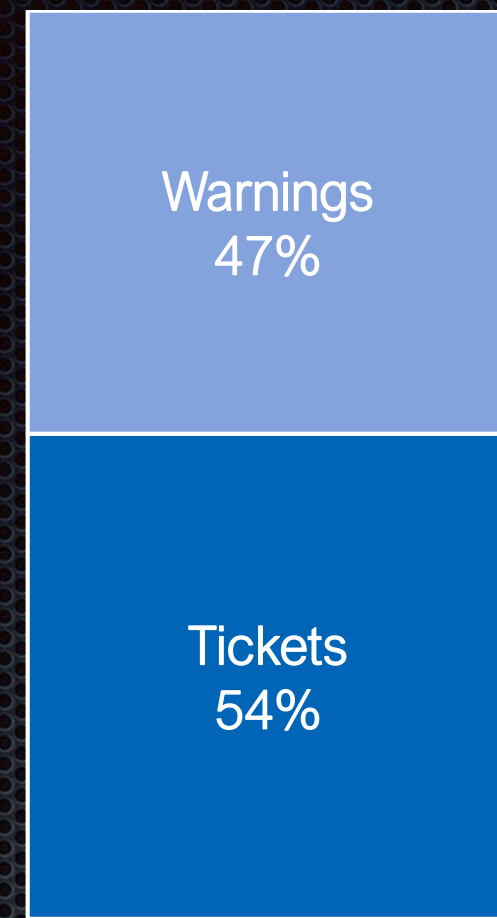
2020: 2,833 violations cited on 2,540 tickets

**Top 10 account for approx. 81% of all violations cited in 2021 & 2020**

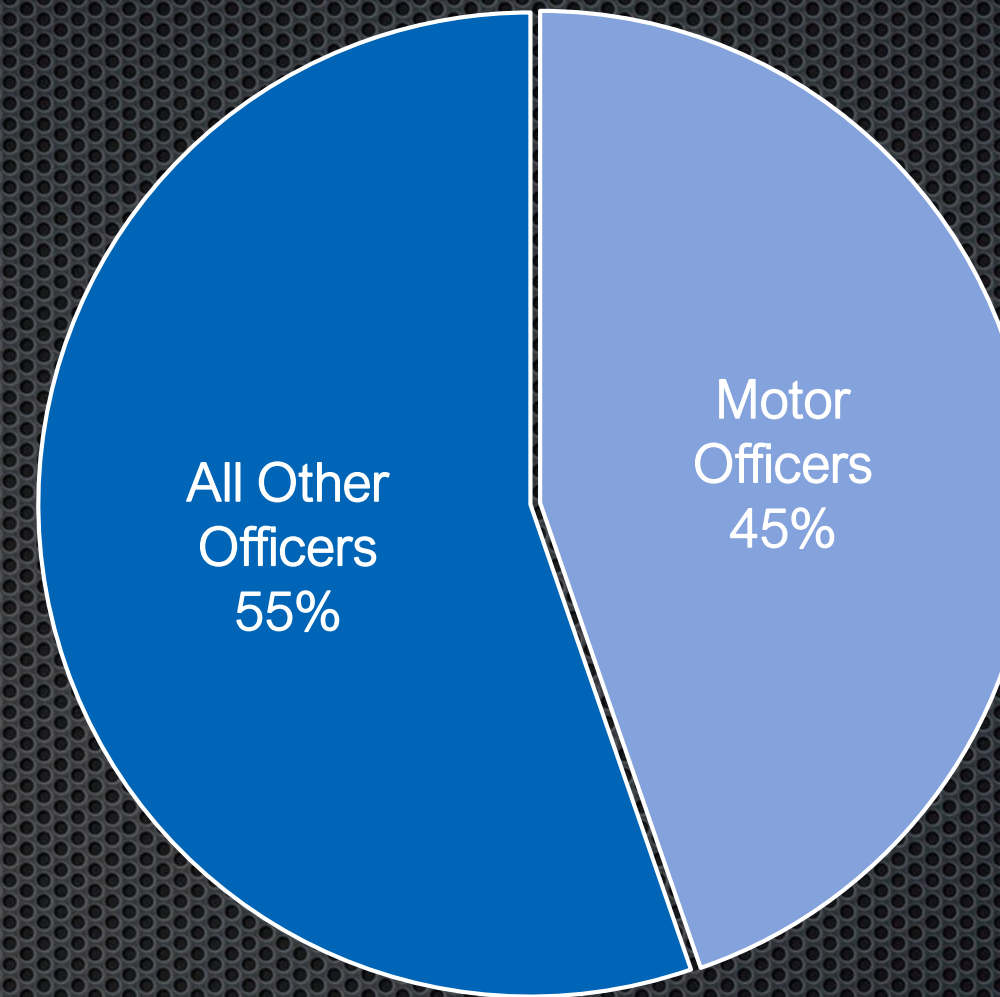
# Traffic Citations



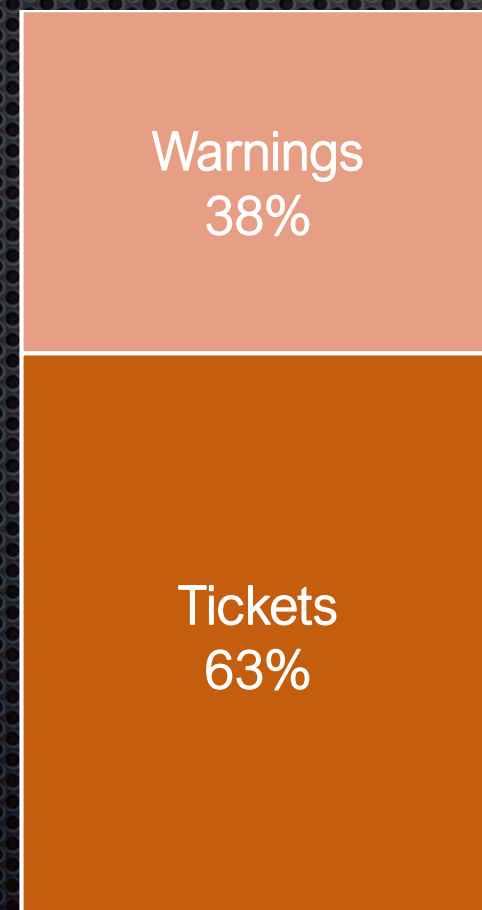
2021 Tickets vs. Warnings



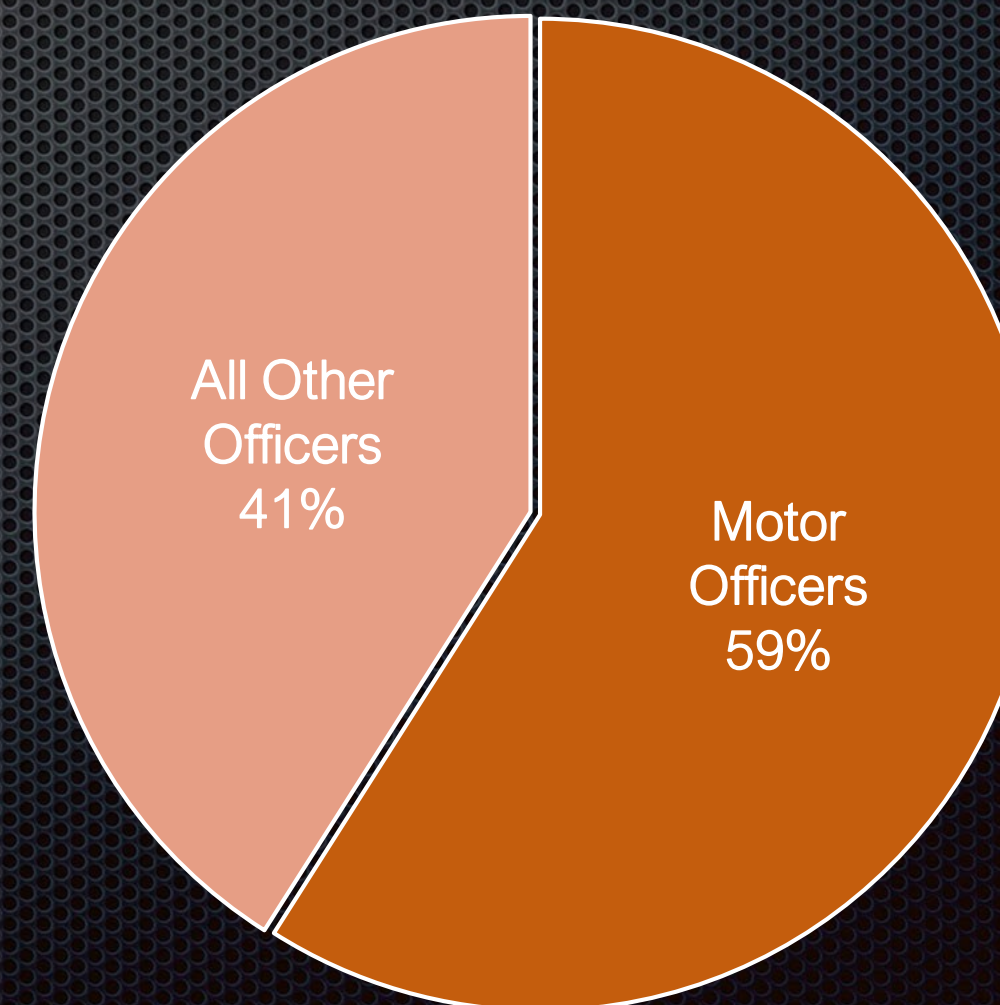
2021 Tickets Issued by Officer



2020 Tickets vs. Warnings



2020 Tickets Issued by Officer



NOTE: Some cites came as result of criminal investigations and not necessarily a traffic stop. Some data variance is expected.

# Oregon STOP Report



In 2017, HB 2355 required law enforcement to report on all discretionary traffic and pedestrian stops to the Oregon Criminal Justice Commission (CJC).

- This program is known as the Statistical Transparency of Policing (STOP) Program.

## Data elements:

- Agency, date/time of stop, location of stop, stop type (traffic/pedestrian), zip code (not required), Perceived race/ethnicity, perceived or verified age, perceived gender, reason for stop, outcome of stop, was there a discretionary search, search reason, search findings, and was an arrest made

Agencies were separated into three tiers based on the number of sworn personnel they have.

- LOPD is a tier 2 agency (25 to 99 officers) and began reporting in July 2019.

LOPD data is collected primarily through our Computer Aided Dispatch (CAD) system following the conclusion of a self-initiated traffic or pedestrian stop.

- These are discretionary stops not tied to a call for service.

# Oregon STOP Report



The CJC uses a number of robust statistical analysis models to examine each agency's submitted data to look for predicted disposition discrepancies and indicators of potential bias based policing.

- Predicted disposition (disposition of similar stops)
- Veil of darkness (stops at night compared to day)
- KPT Hit Rate (searching and finding evidence/contraband)

CJC examines the data and those potential discrepancies and seeks to find out why they exist:

- Unknown reason, driving behavior differences, racial profiling, officer deployment patterns, differences in exposure to police.

CJC's analysis moves beyond census data given highly transient/mobile populations due to work, school, and other commuting patterns.

- 90.2% of Lake Oswego workers come from outside of the city limits
- Traffic stops accounted for 99% of all self-initiated stops in Lake Oswego
- Approx. 60% of all stops were for moving violations

Data is collected primarily through our Computer Aided Dispatch (CAD) system following the conclusion of a self-initiated traffic or pedestrian stop.

- These are discretionary stops not tied to a call for service



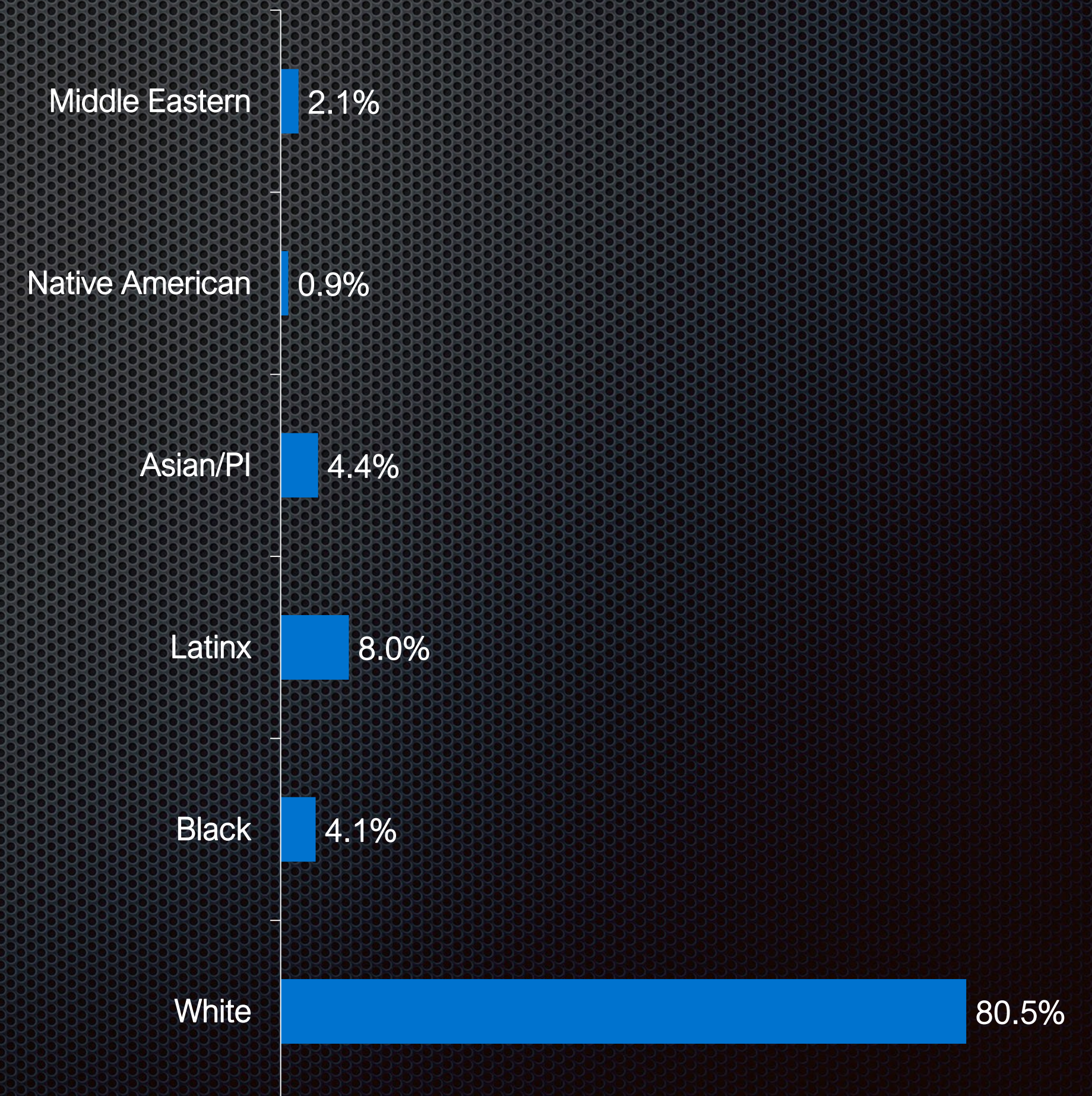
# Oregon STOP Report

CJC Report reviewed data from July 2020 through June 2021 (fiscal year) and given the sample size (4,877 stops), CJC was able to complete two of the three models analyses.

**Predicted Disposition:** “No disparity was identified in the Predicted Disposition analysis.”

Race/Ethnicity	Citation		Search		Arrest		Any Outcome	
	Actual	Predicted	Actual	Predicted	Actual	Predicted	Actual	Predicted
Black	45.8%	46.4%	0.5%	0.3%	0.8%	0.8%	46.1%	46.8%
Latinx	53.1%	49.1%	0.3%	0.2%	1.0%	0.7%	53.5%	49.6%
Asian	44.2%	44.1%	0.0%	0.2%	0.0%	0.5%	44.2%	44.5%
Native American	--	--	--	--	--	--	--	--
Middle Eastern	41.2%	42.3%	0.0%	0.2%	0.5%	0.6%	41.4%	42.8%

Percent of Stops by Demographic Group



**Veil of Darkness:** “No statistically significant disparity was identified.”

Black	Latinx	Asian	Native American	Middle Eastern
0.9	1.14	1.69	--	--

“Lake Oswego Police Department was not referred to DPSST for additional technical assistance.”

“No statistically significant disparities were found.”

# Oregon STOP Report



## CJC Contact Info:

Ken Sanchagrin

Executive Director

Oregon Criminal Justice Commission

[Ken.sanchagrin@Oregon.gov](mailto:Ken.sanchagrin@Oregon.gov)

971-719-6000

[https://www.oregon.gov/cjc/CJC%20Document%20Library/STOP\\_Agency\\_Summaries\\_2021\\_Final.pdf](https://www.oregon.gov/cjc/CJC%20Document%20Library/STOP_Agency_Summaries_2021_Final.pdf)

[https://www.oregon.gov/cjc/CJC%20Document%20Library/STOP\\_REPORT\\_2021\\_FINAL.pdf](https://www.oregon.gov/cjc/CJC%20Document%20Library/STOP_REPORT_2021_FINAL.pdf)

# Behavioral Health Specialist



In April of 2021, LOPD brought on Amber Hambrick, a trauma informed, licensed professional counselor with 15 years of hands-on experience in mental health and case management.

- Responds to mental health crises on-site with and without LOPD personnel, depending on the situation
- Conducts outreach based on police reports/referrals or as part of ongoing assistance plans
- Collaborates with local community agencies to help meet needs of individuals
- Intervenes during crisis to ensure community and personal safety and health
- Provides referrals for people to transitional housing, resources, mental health services, or back to their providers
- Provides in-house crisis intervention training and ongoing mental health training for LOPD staff
- As part of intergovernmental agreement, assists West Linn PD in same capacity; assigned one day a week to agency



## **Amber Hambrick**

ahambrick@lakeoswego.city

**Police Non-Emergency (24 hrs):**

503-635-0238 or 911

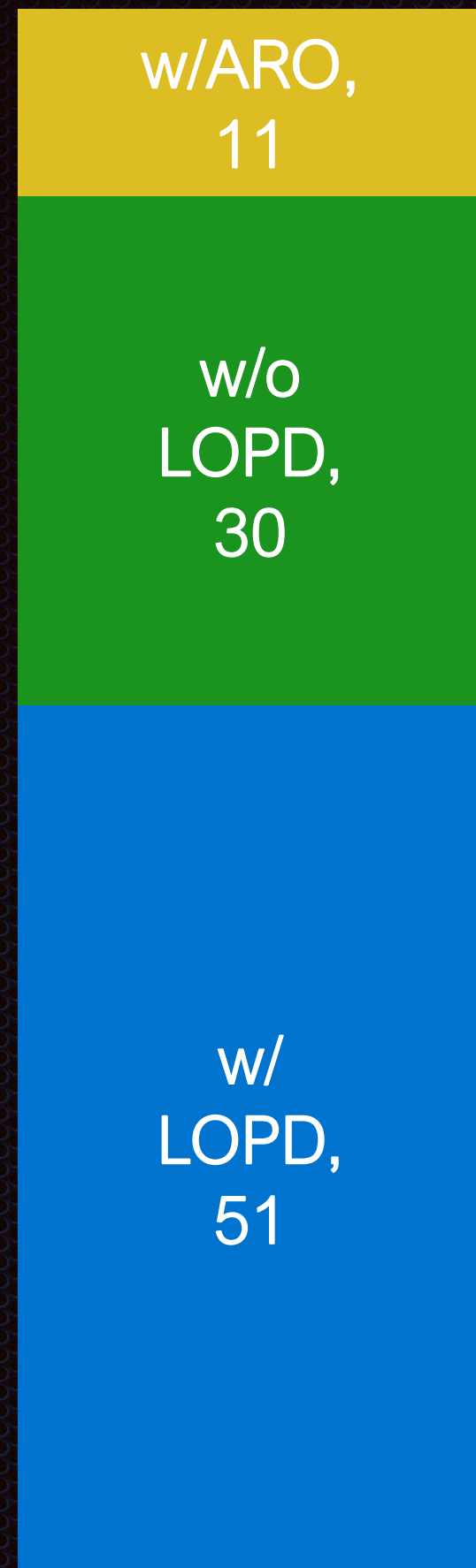
**The Clackamas County Mental Health Crisis Line (24 hrs):**

503-655-8585

# Behavioral Health Specialist



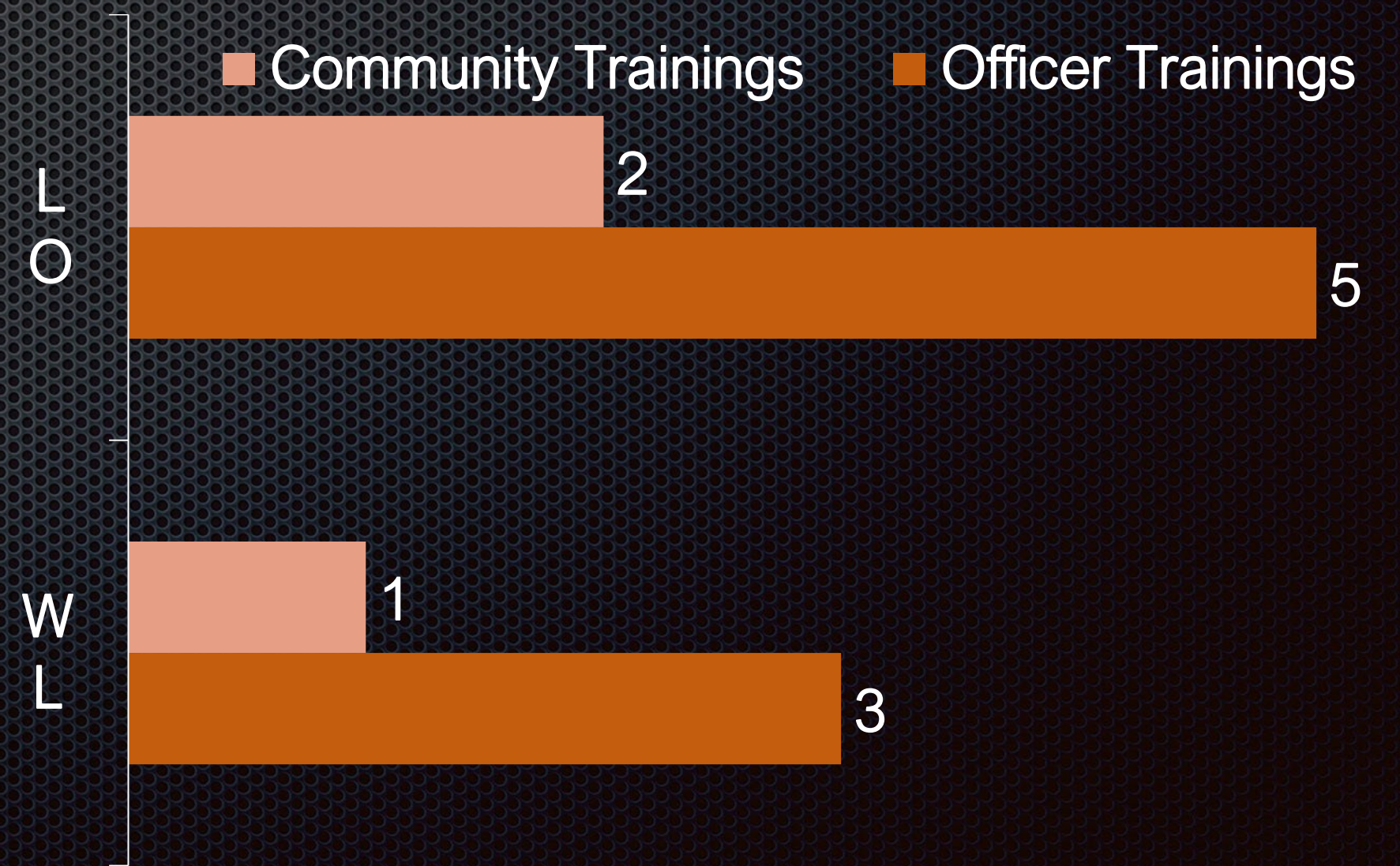
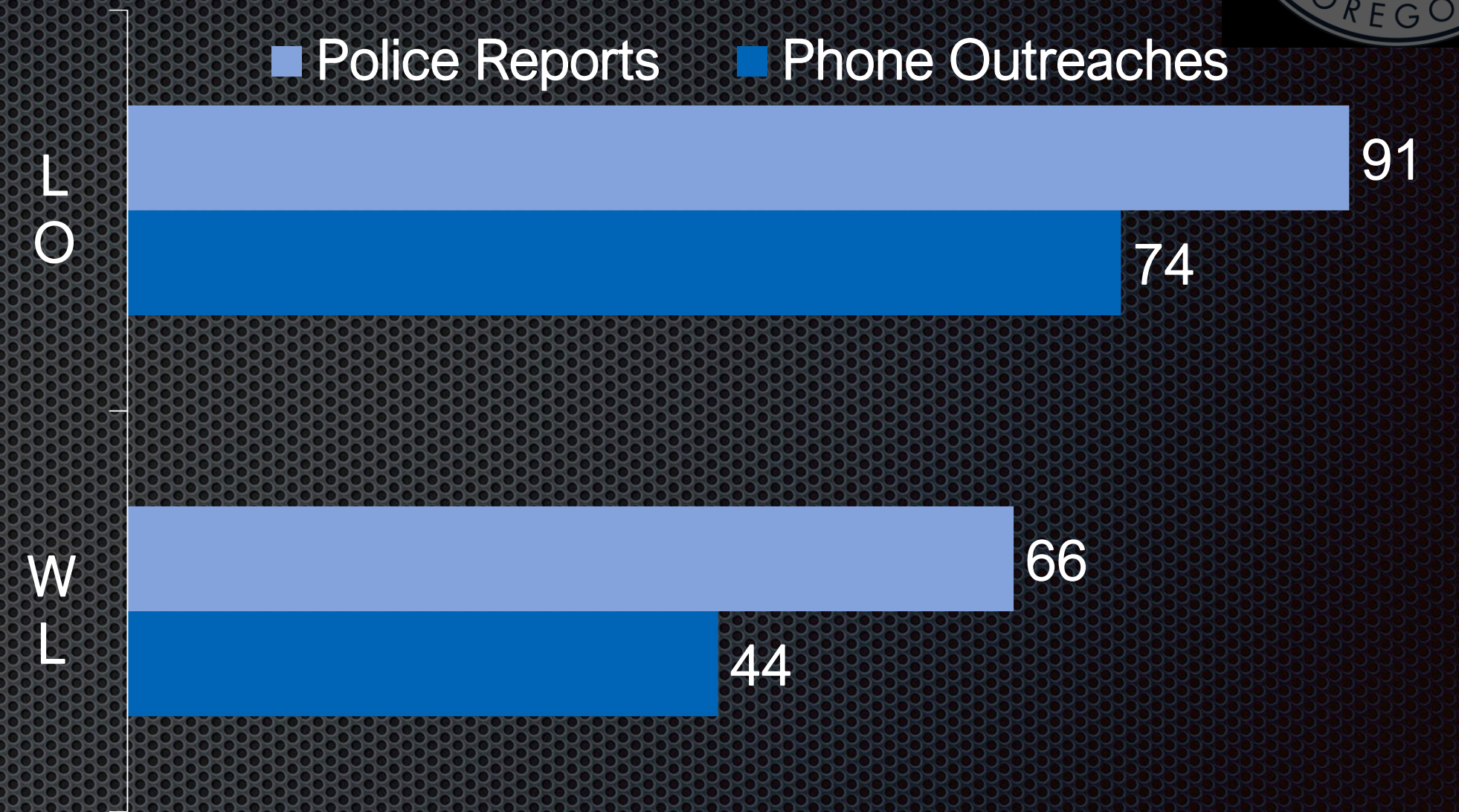
April 2021 – February 24, 2022



92 Total In-Person Outreaches in LO



27 Total In-Person Outreaches in WL



# Use of Force



## What is reported?

"The application of physical techniques or tactics, chemical agents, or weapons to another person. It is not a use of force when a person allows him/herself to be searched, escorted, handcuffed, or restrained." This definition necessitates LOPD officers, outside of the cooperative actions mentioned above, document in a use of force report:

- Any force used on a subject, e.g. physical control, Taser, pepper spray, firearm, etc.; and/or
- Any force tool that is displayed and perceived by a subject for the purpose of gaining compliance, e.g. Taser displayed, OC displayed, firearm displayed, etc.

## Annual Review

All use of force incidents are reviewed by a department team comprised of trainers and supervisory staff in order to:

- Identify any trends in the use of force by department members
- Identify any training recommendations
- Identify any equipment recommendations
- Identify any policy revision recommendations

*NOTE: Reports are also reviewed monthly by the Police Captain as matter of continual oversight*

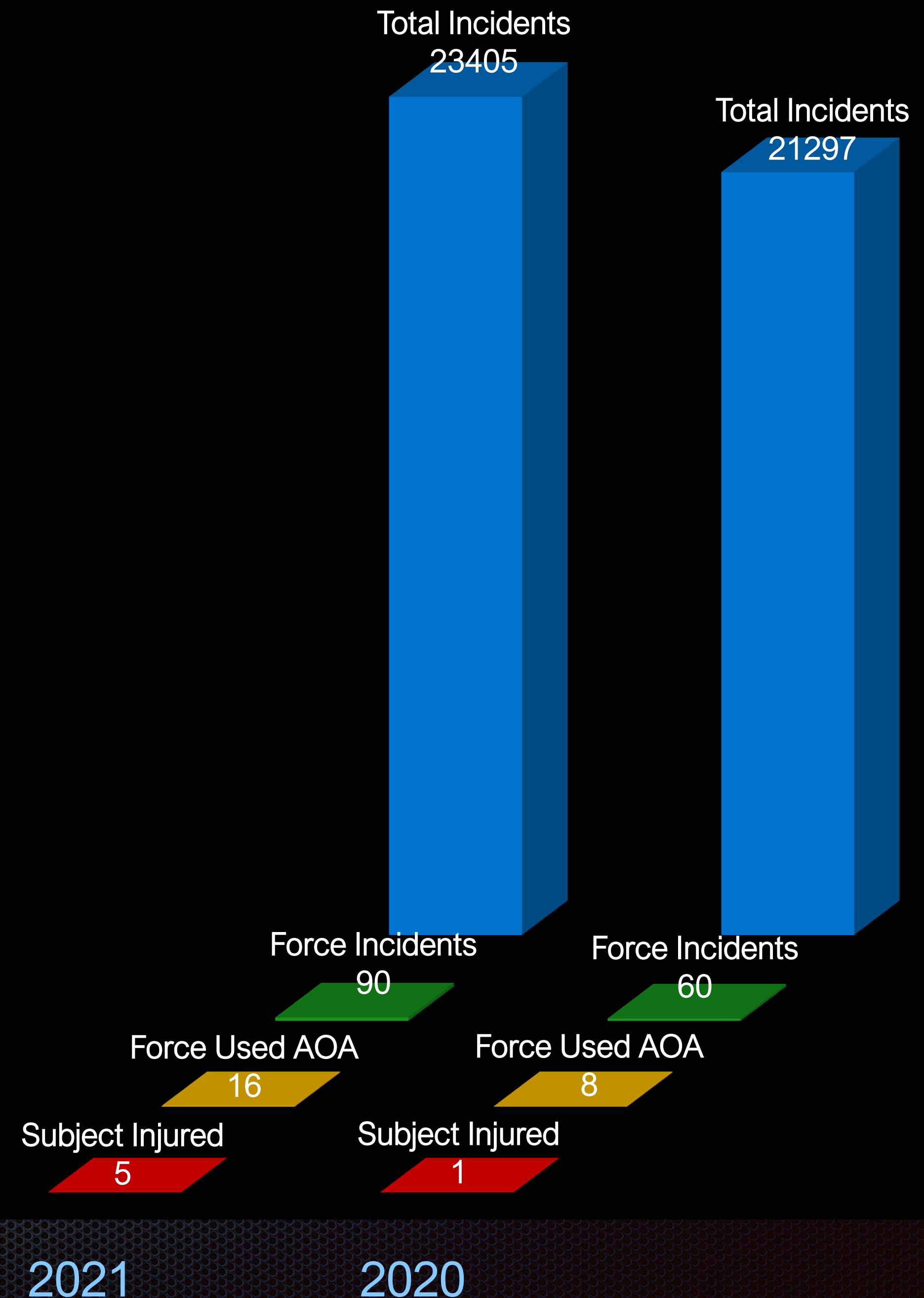
# Use of Force

Out of the 23,405 incidents in 2021, only .38% of those incidents, **less than 1/2 of 1%**, resulted in a use of force

- 2020 was .28%

## Injuries during use of force in 2021

- POLICY: Any circumstances where a person whom force was used exhibits signs of physical distress, has visible injury, or expresses a complaint of injury or continued pain, a supervisor is notified and medical assistance is obtained. This threshold for injury/pain description is less than what Oregon Revised Statue (ORS) defines as “physical Injury” or “serious physical injury.”
- With this lower and more cautious threshold, officers routinely mark injuries as present in their reports, but outside of 2 canine bites and one subject fighting with an officer and then falling after being Tased while trying to flee, injuries consisted mostly of minor scrapes; 5 total injuries noted to subjects (1.9%), 3 to officers.
- There were no reported claims against the city related to officer use of force.

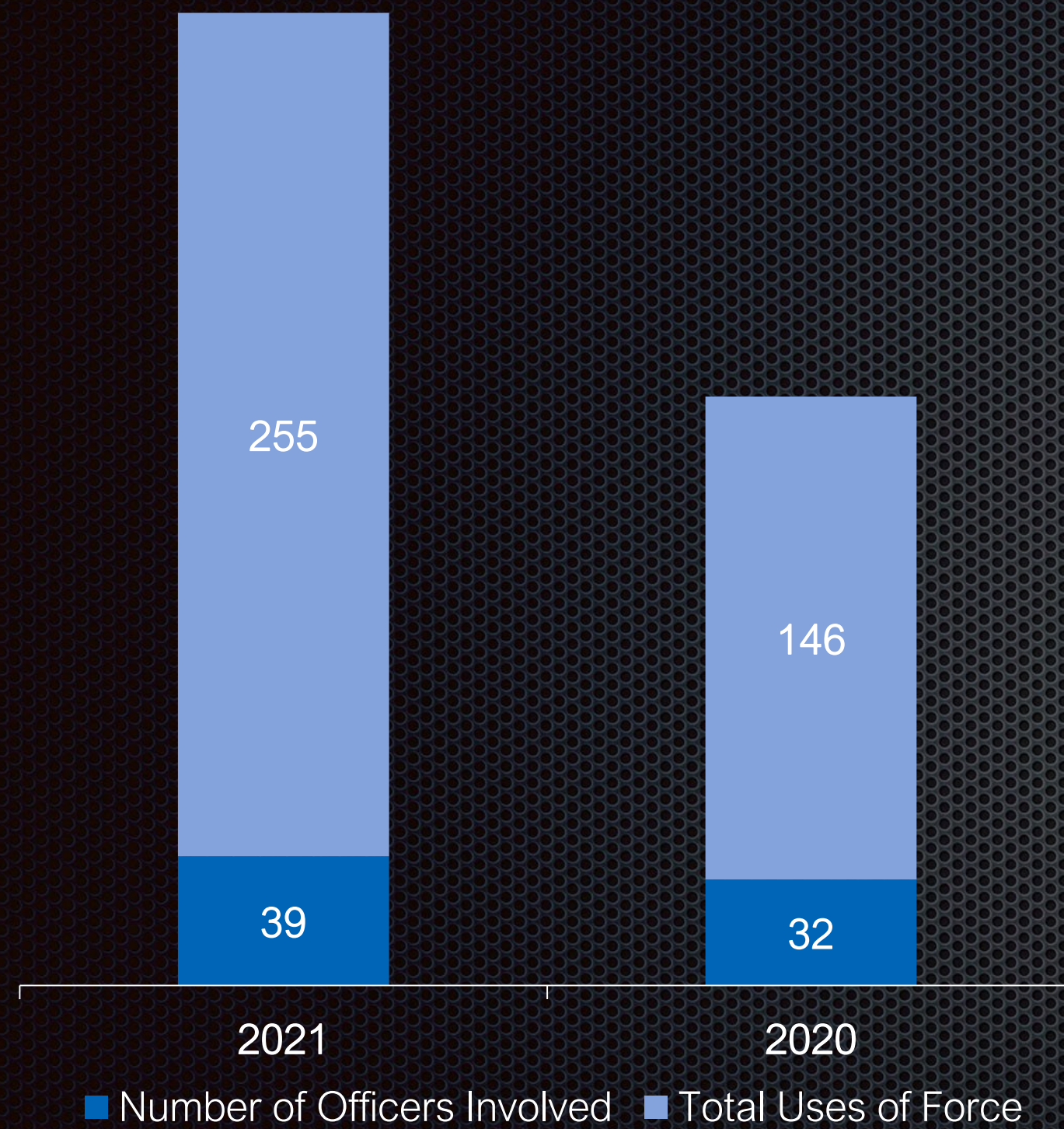


# Use of Force



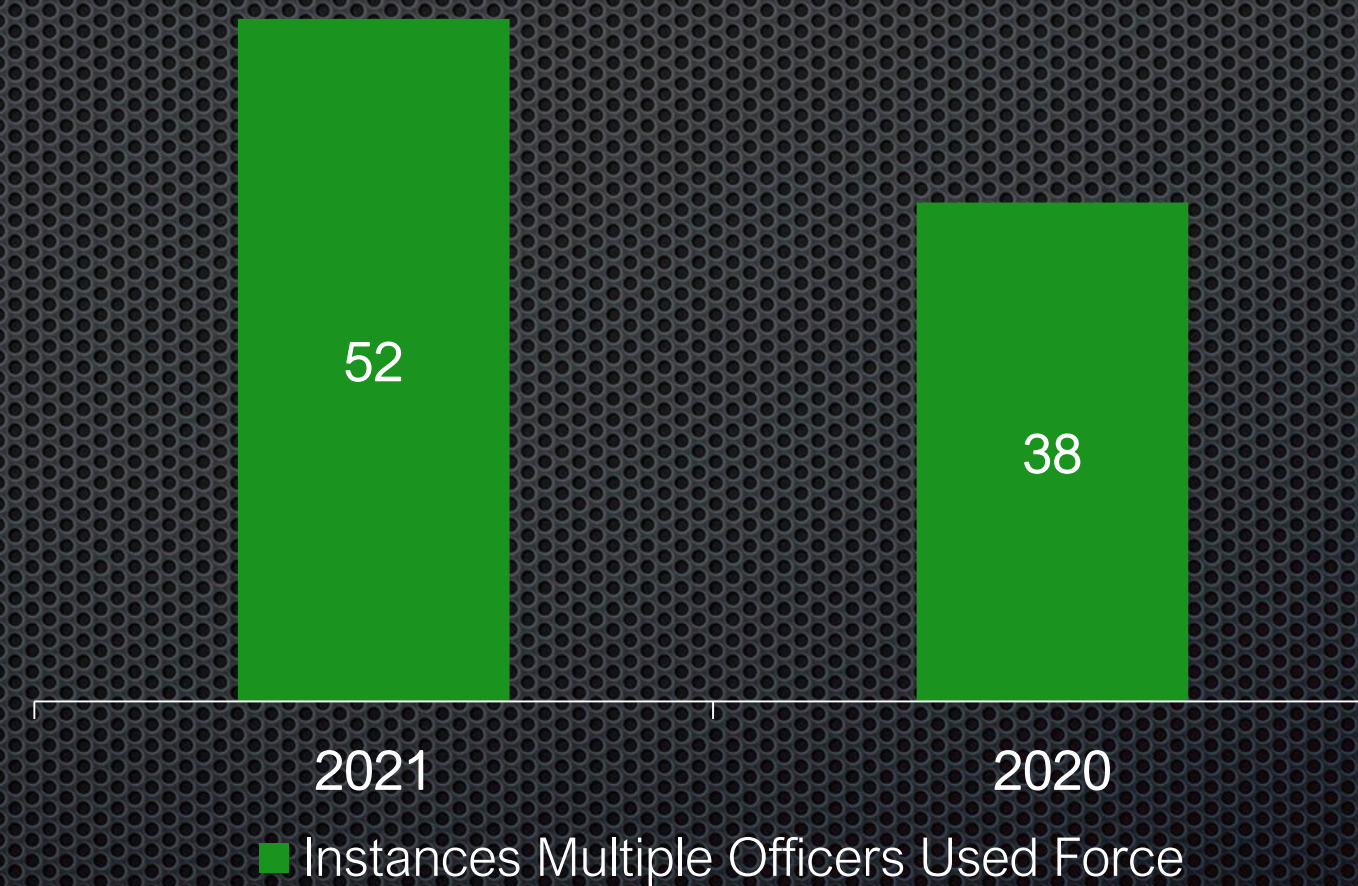
## Total Uses of Force & Number of Officers Involved

Many incidents require multiple officers respond with various capabilities to provide options for safe resolution of incident; e.g. threats of violence, domestic violence, weapon offenses, high risk stops, etc.



## Instances Multiple Officers Used Force on Same Incident

Depending on the severity of the crime or the number of people involved, multiple officers on an incident may display or use force; e.g. One displays a Taser, the other uses physical control



## Number of Incidents an Officer Used Multiple Force Types on Same Subject

Certain displays or uses of force may become inappropriate or ineffective and a change in tactics may be necessary; e.g. person fighting physical control of officer retrieves a weapon so officer displays a firearm or other tool

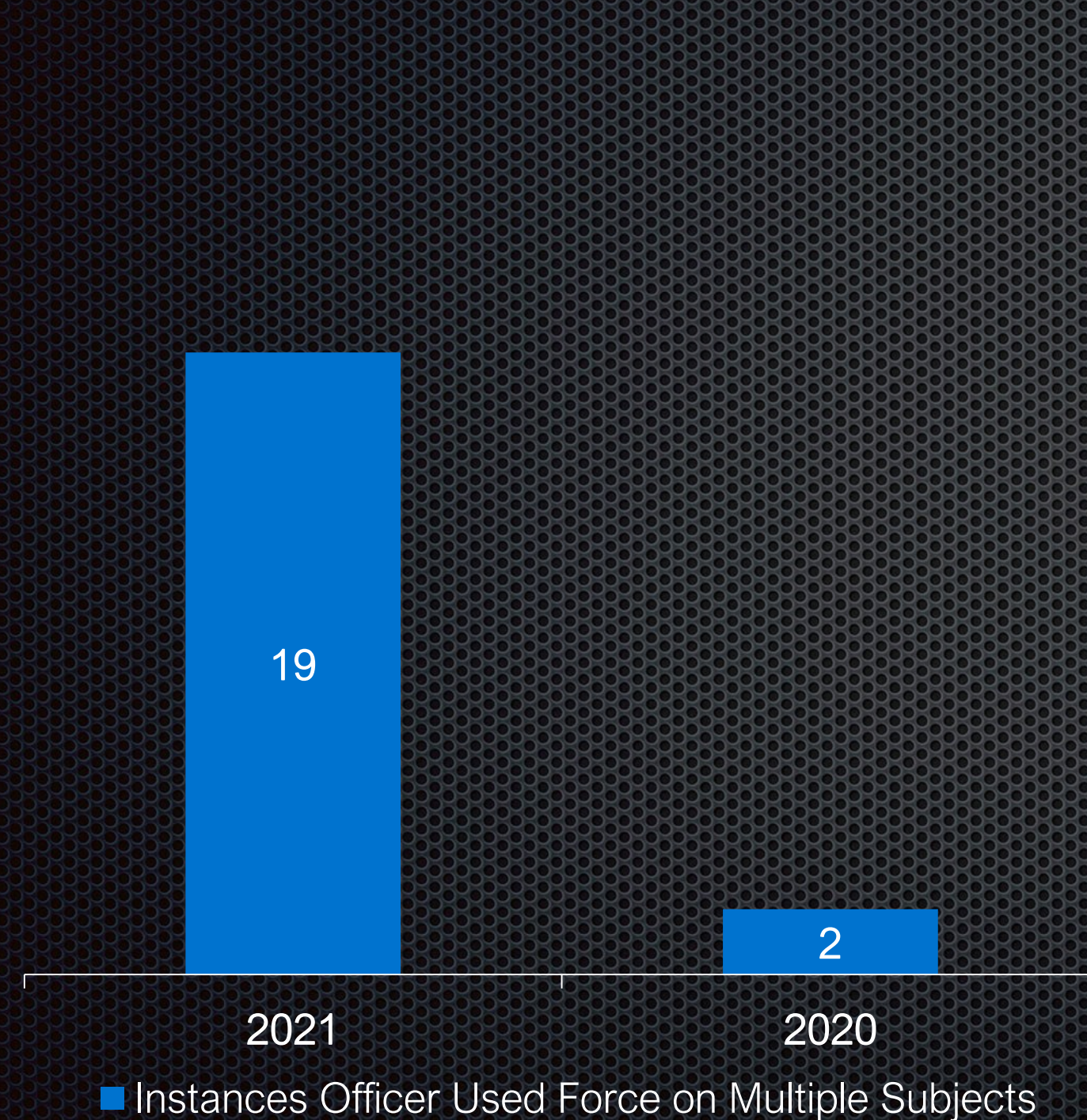


# Use of Force



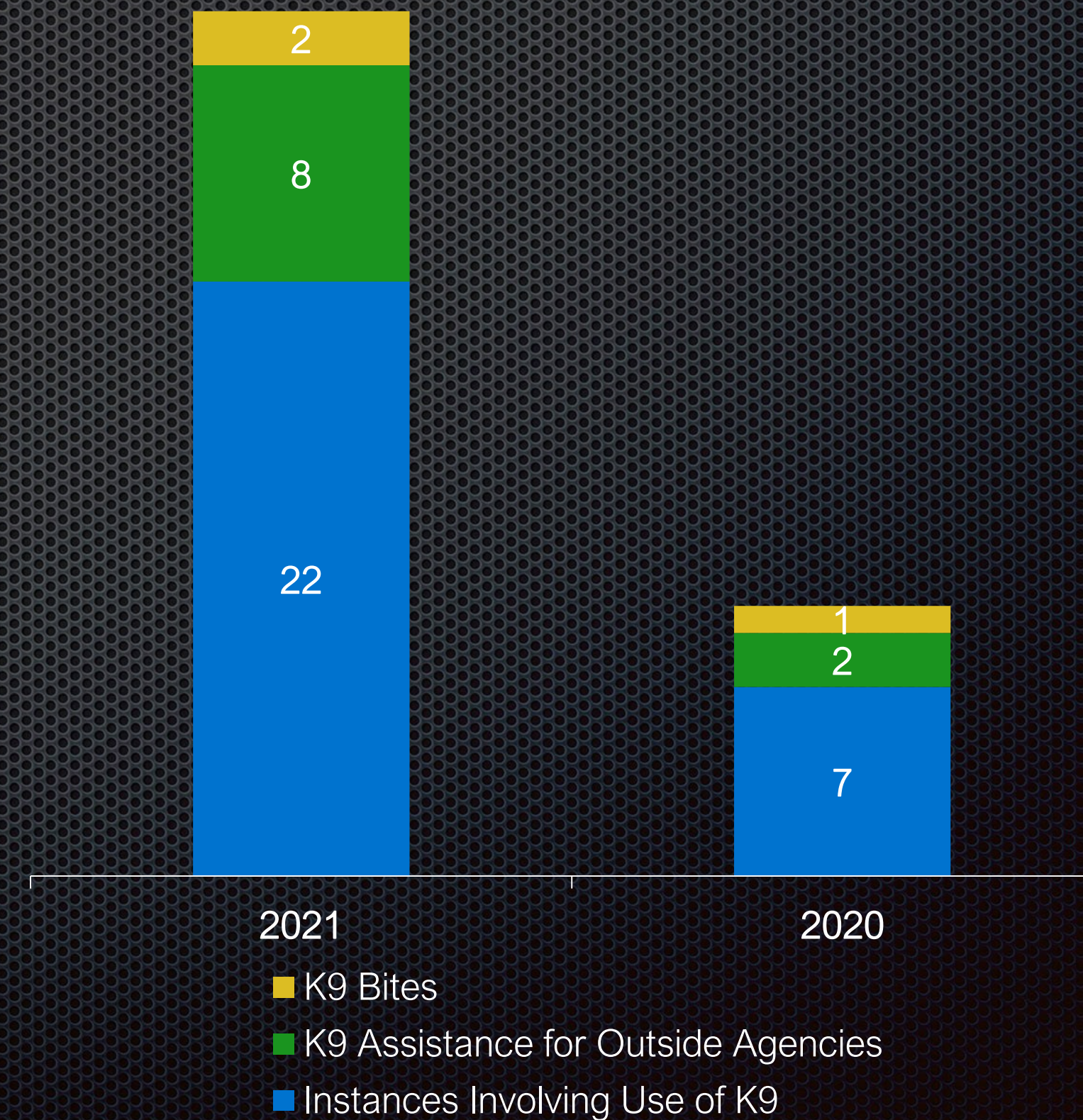
## Instances Officer Used Force on Multiple Subjects

In situations involving multiple subjects, an officer may display a level of force to all of those subjects. Any force displayed/used on multiple subjects still must be justified for each subject; e.g. high-risk traffic stop of vehicle with multiple occupants

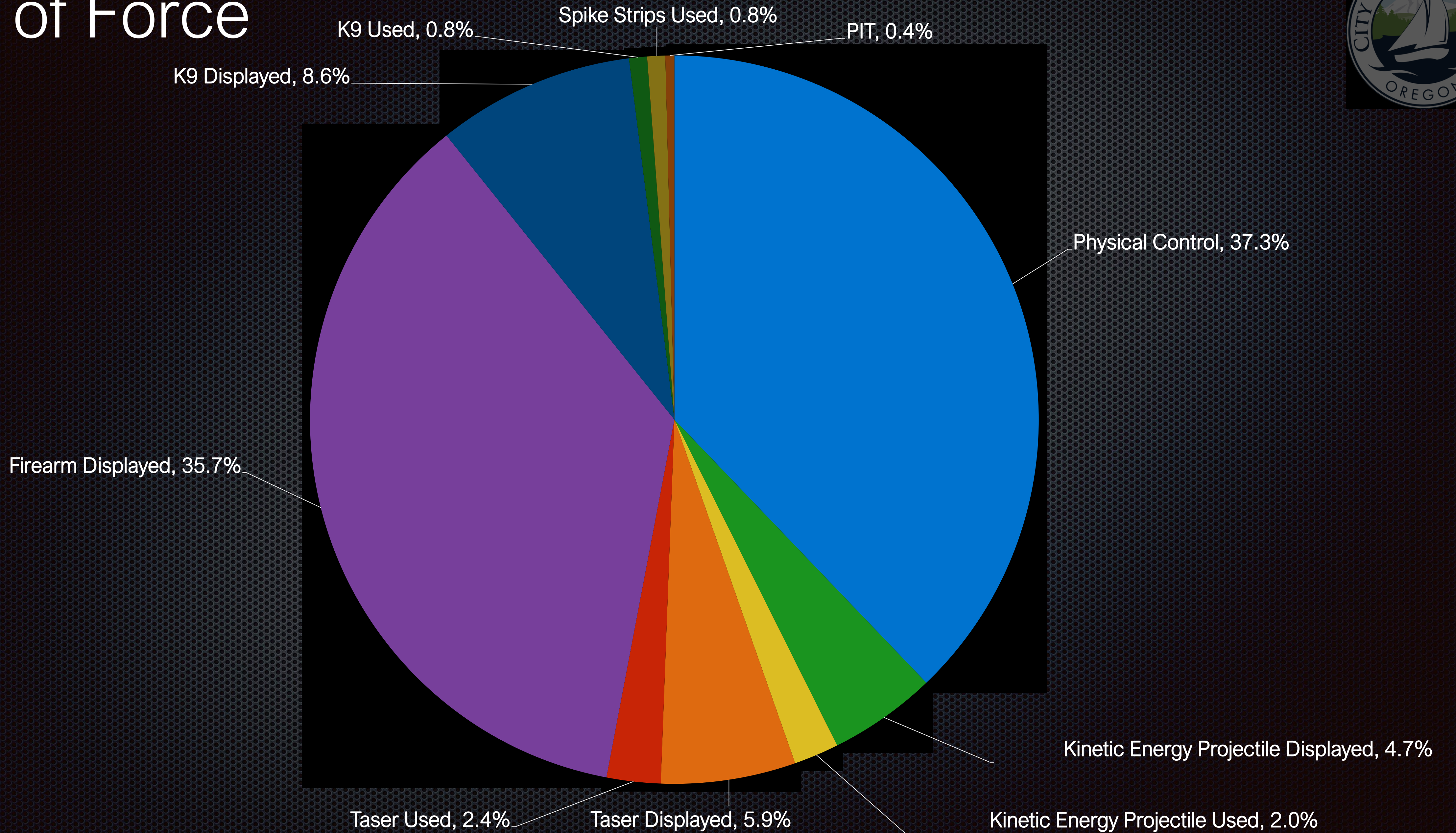


## Instances Involving the Use of an LOPD K9

LOPD has 2 K9 teams that are used in numerous circumstances; e.g. community engagement, suspect tracking, lost/endangered person location, article searches, or in defense of another. Displaying a K9 for purpose of gaining compliance is considered a use of force by our agency



# Use of Force



# Complaints



**What is a complaint? There are basically 2 types:**

- Formal Complaints: Personnel complaints include any allegation of misconduct of improper job performance that, if true, **would** constitute a violation of department policy or federal, state, or local law, policy or rule. Personnel complaints may be generated internally (e.g. a supervisor notices a violation of department policy) or by the public. These complaints are formally investigated.
- Informal Complaints: Inquires about conduct or performance that, if true, **would not** violate policy, law, or a rule. These complaints may be handled informally when they simply require an explanation or clarification on a policy, procedure, or response to a particular incident (e.g. citizen unhappy they received a traffic citation). The department may still track these complaints if a community member wants to file a formal complaint.

# Complaints



**Out of 23,405 Incidents in 2021**

## Internal Complaints

3 Internal Complaints

**.01%** of all incidents resulted in an internally generated complaint.

## Citizen Complaints

6 Citizen Complaints

**.02%** of all incidents resulted in a citizen complaint.

- 2021 had approx. **52% decrease** in the number of complaints from 2020 (19; 8 internal, 11 citizen).
- Received no complaints involving the use of force in 2021.
- Received 1 bias-based policing complaint that was investigated and not substantiated. Incident was reported to State as required by law.
- All other citizen complaints were investigated and the allegations not substantiated.

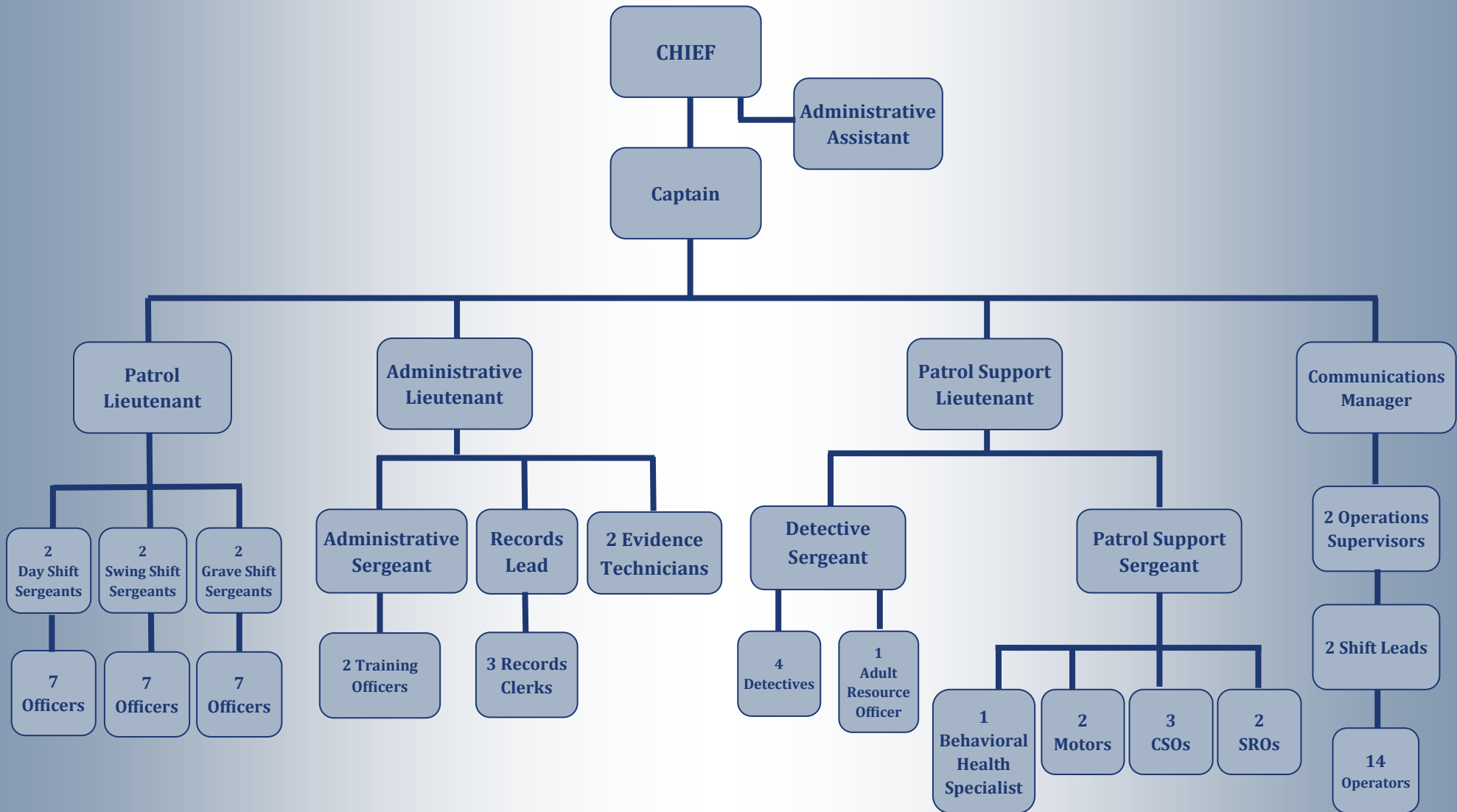


**Thank You**

**Questions?**

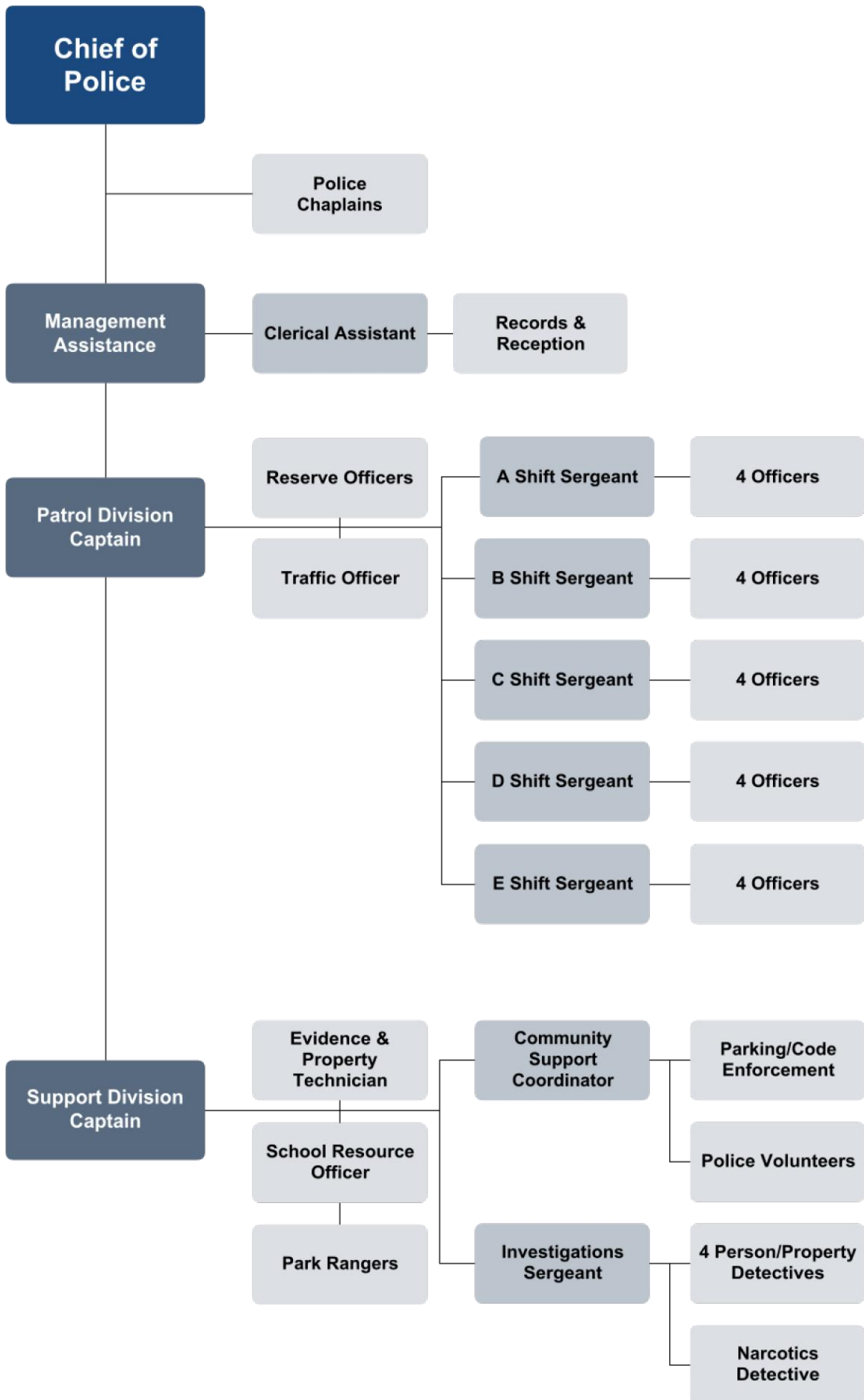
# LAKE OSWEGO POLICE DEPARTMENT

## 2024 Organizational Chart



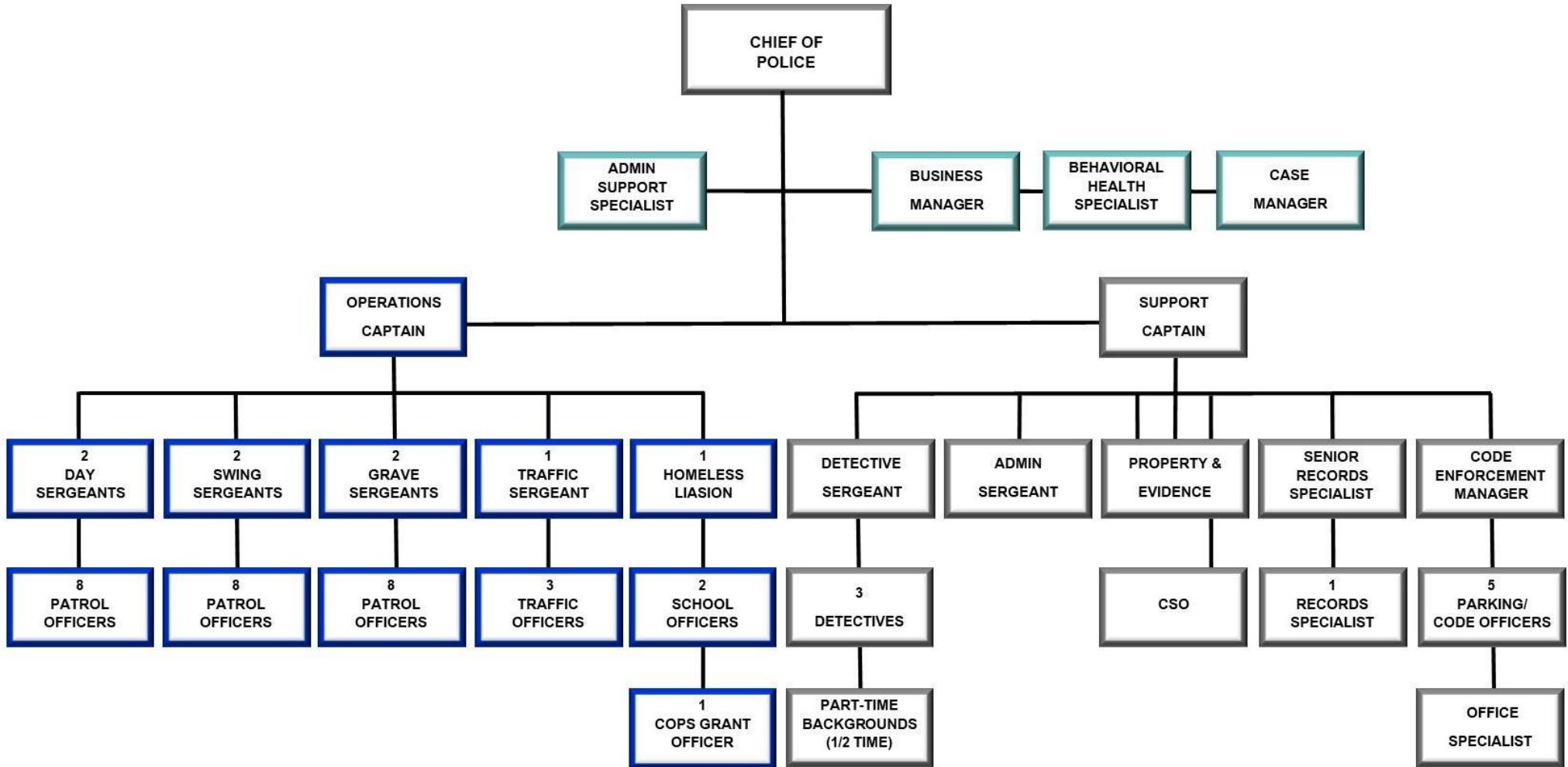
The Lake Oswego Police Department prides itself on maintaining highly qualified and professional personnel. The department consists of 47 sworn Officers and 27 non-sworn personnel.

The Lake Oswego Police Department serves our community of 40,411 (2021) residents and local businesses spanning an area of 11 square miles.



# OREGON CITY POLICE DEPARTMENT

## Agency Organizational Chart

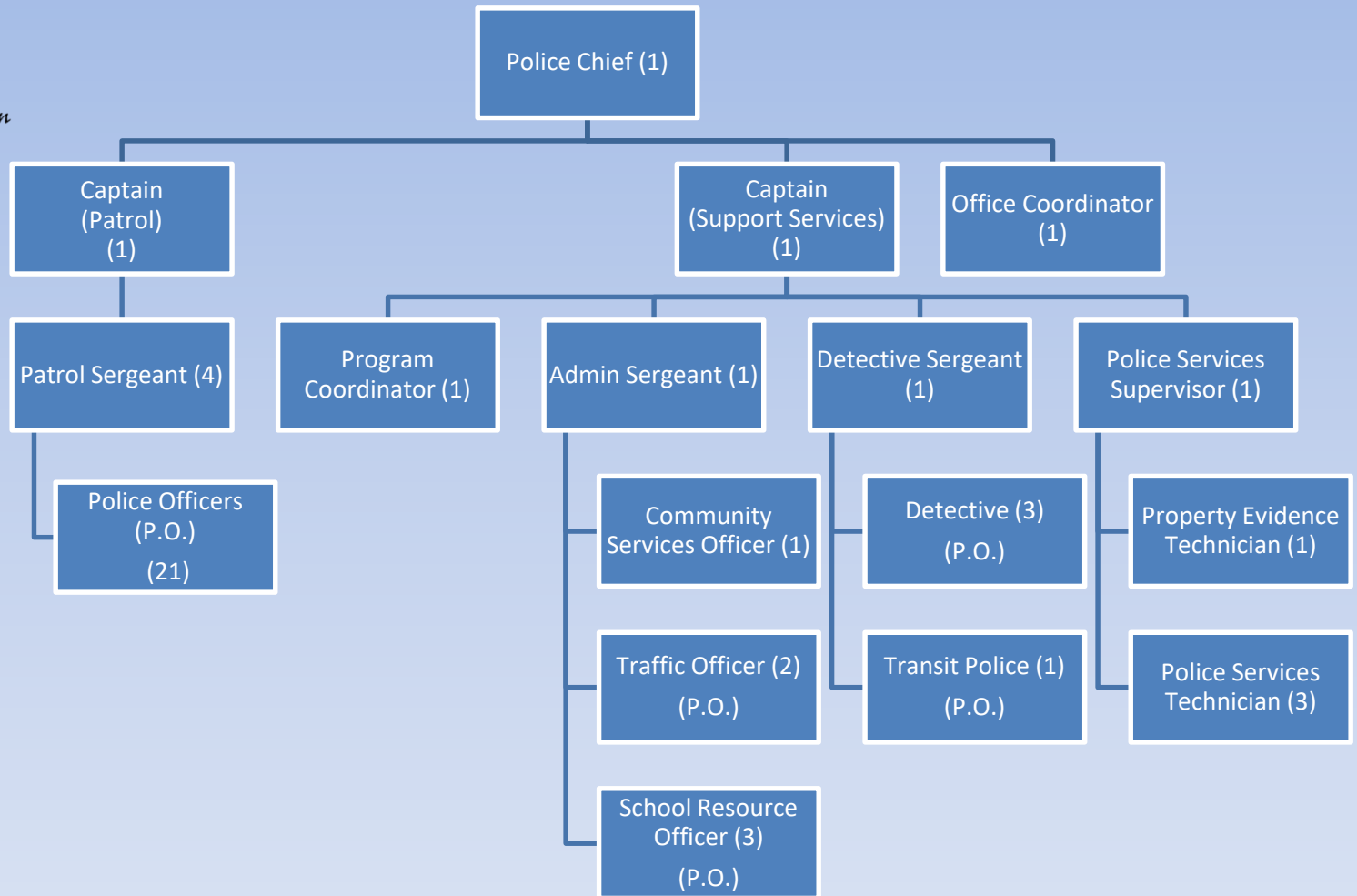


As of July 2025 the Oregon City Police Department consists of 46 sworn personnel and 15.5 non-sworn personnel.

# Police Services

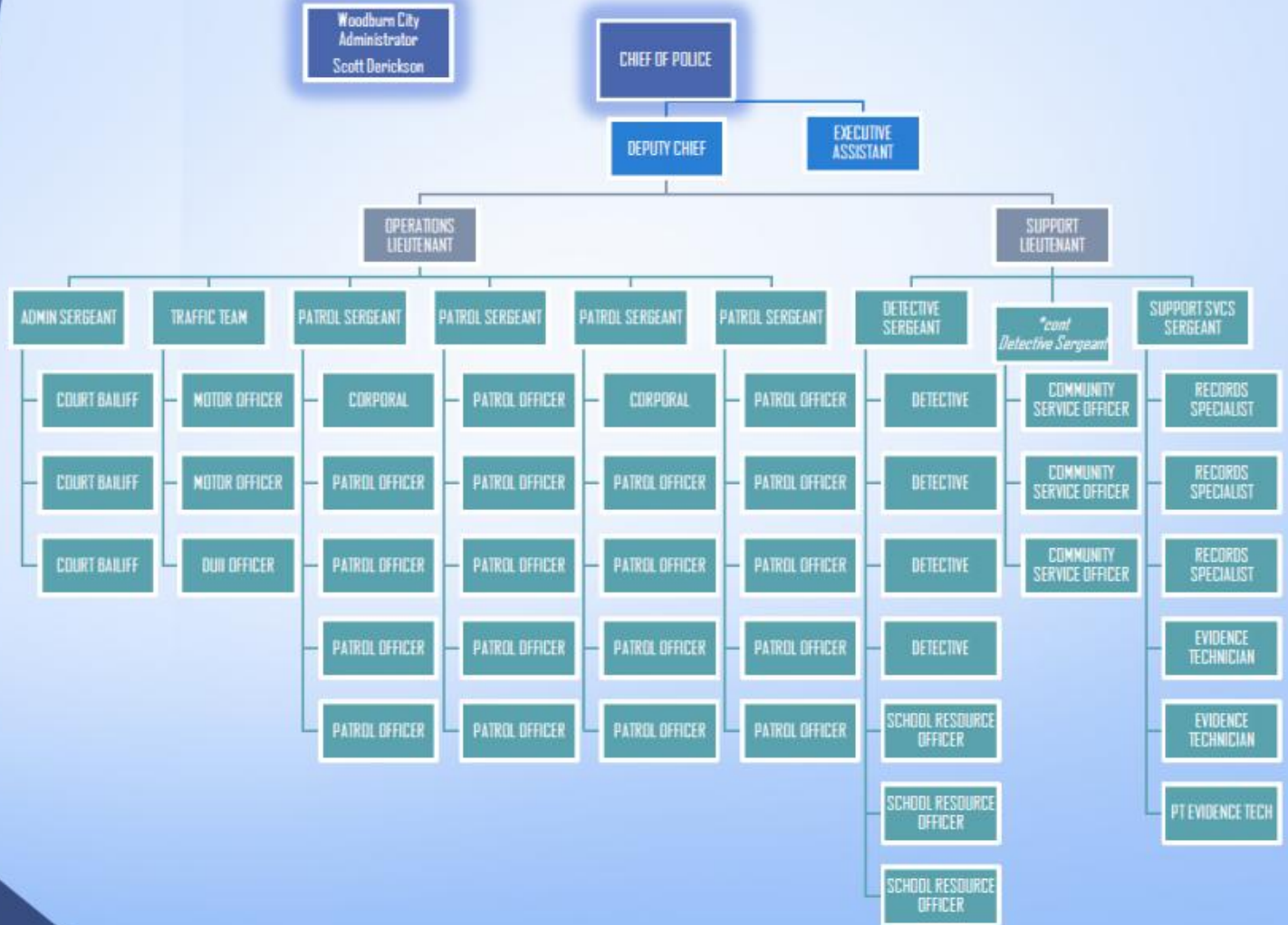


City of Tualatin





WOODBURN POLICE DEPARTMENT





# CHIEF OF POLICE

## Job Description

*The job description does not constitute an employment agreement between the City and employee and is subject to change. The specific statements shown in each section of this description are not intended to be all-inclusive. They represent typical elements and criteria considered necessary to successfully perform the job.*

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<b>Class Title:</b>	Chief of Police	<b>Effective Date:</b>	May 1, 2023
<b>Working Title:</b>	Chief of Police	<b>Type:</b>	Management/Supervisory
<b>Department:</b>	Police	<b>Supervisor:</b>	City Manager
<b>FLSA Status:</b>	Exempt	<b>Supervises:</b>	Deputy Chief, Lieutenants, Executive Assistant

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### CLASSIFICATION SUMMARY

This department director position directs a police department by providing progressive management and leadership. Duties include planning, organizing, staffing, coordinating, budgeting, and reporting all activities of the Police Department. The ability to act independently is a prerequisite in this position. This position requires extensive contact with the public and the person filling this position is expected to be highly involved in the community. The Chief of Police provides executive-level management of all subordinate functions of the police department, ensuring all agency activities are consistent with community and industry standards and expectations and in keeping with the mission of the Police Department. Personal conduct and behavior (on-duty and off-duty) must be such that it builds public confidence in the agency and its members. The Chief of Police is a contributing member of the City's Executive Leadership Team. The Police Chief makes recommendations to the Mayor and Council through the City Manager regarding the policies and resources needed to successfully achieve the city's strategic objectives.

### SUPERVISION

This is a supervisory position. This position supervises assigned employees, which includes: scheduling and assigning work; mentoring, coaching, and training; developing work plans and reviewing work for completion; evaluating performance and providing necessary feedback to employees; setting work standards; imposing or effectively recommending necessary disciplinary action; responding to grievances; and making or effectively recommending hiring and termination decisions.

### PHYSICAL & MENTAL DEMANDS – SAFETY – WORKING CONDITIONS

*The physical demands (including lifting, mobility, movement and manual dexterity), work environment and working conditions described below are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

#### Physical & Mental Demands

Mental alertness is important because of the need to make fine discriminations and decisions concerning subtle cues of impending danger or to discover inconsistencies in witnesses or situations changing dramatically within a few seconds, taxing the maximum of human endurance. Therefore, incumbents must remain physically and mentally fit to enable them to handle recurrent contacts and involvement with dangerous and potentially dangerous people, animals and equipment, using only that amount of force that reasonably appears necessary, given the facts and circumstances perceived by the officer at the time of the event, to effectively bring an incident under control.

Contact with the news media regarding police matters including sensitive, difficult, or controversial issues. In addition, the position requires frequent use of interpersonal skills, teamwork, customer service skills, and discretion; continuously using decision-making skills, problem analysis, negotiation, independent judgment, and/or independent action.

## **Safety**

Employees must maintain a safe work environment by complying with City and Department safety policies and rules and by practicing safety while performing the essential functions of the position. This supervisory position is responsible to actively support safety and loss control measures for the City as a whole and to maintain accountability for safety and loss control issues within the department.

## **Working Conditions**

The Chief of Police's work is normally performed in an office setting or attending meetings at a variety of locations including early mornings, evenings and weekends as necessary. Formal presentations are frequently made by this classification. Work is subject to constant interruptions and quick changes in priorities or issues needing attention. May be exposed to hazards present at a variety of emergency conditions which require law enforcement presences. Duties include risk of exposure to bloodborne pathogens and disease. Subject to 24-hour call-back for emergency conditions.

## **ESSENTIAL FUNCTIONS – DUTIES & RESPONSIBILITIES**

*An employee in this classification may perform any of the following duties; however, these examples do not include all the specific tasks which an employee may be expected to perform. Duties and responsibilities are subject to change by the employer as the needs of the employer and requirements of the job change.*

It is the responsibility of every employee to represent the City of Keizer by responding to the public, citizens, its employees, and others promptly, professionally, and with courtesy. This includes regarding everyone, internal and external, as a customer and delivering the best service possible in a respectful and patient manner. Additional responsibilities include assisting other staff in the performance of their duties as assigned and operating a motor vehicle safely and legally while on City business.

### **100% Job Duties**

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Plans the activities, programs and goals of the Police Department including support, patrol, and investigations, to ensure maximum service to the community.

Develops and ensures the implementation of rules and regulations for the Police Department.

Responsible for the proper, efficient, and lawful enforcement of state laws and local ordinances which the Police Department is authorized to enforce.

Prepares a schedule and assigns personnel to best meet the needs of the public.

Provides leadership and supervision over police personnel, including assigning and reviewing work, evaluating performance, disciplining, and setting up training programs.

Makes reassignments, promotions, and appointments within the department with the approval of the City Manager.

Assists in the coordination of efforts and information between police agencies within the community.

Regularly demonstrates effectiveness in engaging with all segments of a diverse community, proactively builds bridges with stakeholders, maintains and builds upon valuable community relationships, invests themselves in the community.

Establishes and maintains an effective public relations program between the department and the community.

Meets and confers with citizens, the press and groups concerning complaints, problems, requests, and suggestions.

Studies and determines law enforcement needs of the city and recommends solutions to the City Manager.

Prepares and presents a budget for the Police Department to the City Manager.

Ensures that all records be kept by the department that are required to support accurate reports to the City Manager, City Council, state, and federal agencies.

Conducts internal investigations on accusations or complaints against police officers, reports to the City Manager, and recommends disciplinary action where warranted.

Ensures subordinates are aware of changes in policing, including legislation and case law.

Maintains an awareness of policing research and leads the department in modern policing methods.

Ensures officers police effectively with fairness and justice.

Must be able to provide credible sworn testimony.

## **MINIMUM QUALIFICATIONS**

### **Education & Experience**

Bachelor's degree from an accredited college or university in law enforcement, criminal justice administration, police science, social sciences, public administration, business administration, or similarly related field; 10 or more years of progressively responsible law enforcement experience including 5 years of related management experience; or any equivalent combination of education and experience which provides the knowledge, skills and abilities to perform the essential functions and responsibilities of the position.

### **Skill & Ability**

- Able to write and speak in the English language proficiently and persuasively.
- Must be able to provide credible sworn testimony.

### **Licenses, Certifications & Other Requirements**

- United States citizen.
- 21 years of age at time of appointment.
- Free of criminal convictions defined by Oregon Administrative Rule.
- Be of good moral character.
- Pass the Pre-Background Screening (Integrity Interview).
- Pass a comprehensive background investigation.
- Pass medical and psychological evaluations.
- Must possess Oregon DPSST Management Certification (out of state candidates must obtain within 2 years after appointment).
- Valid driver license at time of hire and maintained during employment.
- Required at time of appointment: possession of Law Enforcement Data System (LEDS) certification and Criminal Justice Information Services (CJIS) clearance or must obtain both within 90 days. Must be maintained during employment.

## **ADDITIONAL QUALIFICATIONS**

### **Knowledge**

- Management techniques, training and development, communication of values and standards, performance evaluation, management/labor communication, and problem solving.
- Decision-making techniques.
- Modern methods and techniques used in prevention, investigation, and suppression of criminal activities.
- Role of law enforcement in the criminal justice system and the maintenance of public safety.
- Organizational budget methods, procedures, and techniques.
- Police communications and computer applications.
- Importance of interest in people and community input.

### **Skill & Ability**

- Provide community outreach, speeches and presentations, and a user-friendly citizen complaint process.
- Ensure visibility, accessible and open to news media.
- Establish and maintain effective working relationships with managers, supervisors, and employees.
- Utilize supervisory techniques to assign, review, and appraise the work of staff members.
- Apply city, state, and federal laws, regulations, policies, and procedures as they relate to the city law enforcement operations.
- Effectively lead the department in an emergency or disaster situation.
- Operate assigned firearms and equipment skillfully, safely, and in conformance with applicable laws and regulations
- Communicate effectively in oral and written format to management, employees, elected officials, and the public.

### **Licenses, Certifications & Other Requirements**

- Standard first aid & Adult and Child CPR Certification or able to obtain certification as soon as practicable.
- Required within six months of promotion or hire: NIMS IS 100, 200, 700, and 800 Certifications.
- Required within two years of promotion or hire: NIMS IS 300 and 400 Certifications.
- Must obtain Oregon DPSST Executive Certification within two years of appointment.



# COMMUNITY SERVICE OFFICER

## Job Description

*The job description does not constitute an employment agreement between the City and employee and is subject to change. The specific statements shown in each section of this description are not intended to be all-inclusive. They represent typical elements and criteria considered necessary to successfully perform the job.*

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<b>Class Title:</b>	Community Service Officer	<b>Effective Date:</b>	December 1, 2024
<b>Working Title:</b>	Community Service Officer	<b>Type:</b>	Represented by Keizer Police Assoc.
<b>Department:</b>	Police	<b>Supervisor:</b>	Admin Lieutenant
<b>FLSA Status:</b>	Non-Exempt	<b>Supervises:</b>	None

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### CLASSIFICATION SUMMARY

Major responsibilities require consistent attention and commitment to the agency’s mission. All assigned duties and tasks are expected to be performed in an effective, efficient, and safe manner with minimal supervision. Employee must accept the responsibility to support and promote this organization’s mission and comply with its directives. Personal conduct and behavior (on-duty and off-duty) must be such that it does not bring disrepute or unnecessarily endanger the public’s trust or confidence in the agency or its members. This position requires a high level of problem-solving ability, self-initiative and the ability to work independently in conformance with established guidelines and standards. Successful performers are those who are capable and willing to make decisions that are consistently in conformance with the agency’s mission, goals, and objectives.

Under the direction of a police lieutenant, this non-sworn position assists sworn law enforcement personnel with non-emergency calls, and acts as a community relations outreach for City services; enforces and investigates complaints and municipal and ORS violations; assists sworn officers in completing investigations and other related law enforcement tasks.

### SUPERVISION

Not a supervisory position.

### PHYSICAL & MENTAL DEMANDS – SAFETY – WORKING CONDITIONS

*The work environment/physical demands described are representative of those an employee may encounter while performing the essential functions of this position. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

#### Physical & Mental Demands

In the performance of job duties, the employee is frequently required to sit; talk and hear; walk; use hands to handle and feel objects, tools, or controls; bend; stoop; and reach with hands and arms. Work conditions may vary by shift. Some tasks are performed in an office environment while others are performed in vehicles and outdoors. Some tasks require heavy lifting, pushing, pulling, or carrying heavy loads. Physical strength, agility, and stamina sufficient to perform the duties, including work beyond normal requirements in emergencies are required. Flexibility is important because of the need to frequently enter and exit vehicles, climb over and around obstacles, work in confined spaces, etc.

Mental alertness is important due to the specialized nature of the work involved. The ability to exercise discretion and judgment and to maintain confidentiality is imperative. The employee must remain physically and mentally fit to handle recurrent contacts and involvement with potentially dangerous people, animals and equipment.

#### Safety

Employees must maintain a safe work environment by complying with City and Department safety policies and rules and by practicing safety while performing the essential functions of the position.

## **Work Environment**

In the performance of the job duties, the employee will perform this job in an office environment under usual office working conditions with work also performed outside in all types of weather conditions. The noise level in the work area is typical of most office environments, with telephones, frequent interruptions and background noises, but can be moderately noisy while in the field. Duties include contact with employees, other government agencies, vendors, and customers in conflict situations and risk of exposure to bloodborne pathogens and disease. Frequent work performed off-site in all types of weather conditions. Overtime may occur but is not a regular component of this position.

## **ESSENTIAL FUNCTIONS – DUTIES & RESPONSIBILITIES**

*An employee in this classification may perform any of the following duties; however, these examples do not include all the specific tasks which an employee may be expected to perform. Duties and responsibilities are subject to change by the employer as the needs of the employer and requirements of the job change.*

It is the responsibility of every employee to represent the City of Keizer by responding to the public, citizens, its employees, and others promptly, professionally and with courtesy. This includes regarding everyone, internal and external, as a customer and delivering the best service possible in a respectful and patient manner. Additional responsibilities include assisting other staff in the performance of their duties as assigned, maintaining regular job attendance and adherence to working hours, and operating a motor vehicle safely and legally while on City business.

### **60% Patrol Support Duties**

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Under the direction of the Patrol Lieutenant:

Investigate violations of City ordinances and graffiti reports. Handle issues that do not require the presence of sworn law enforcement including, but not limited to, lost and found property, animal complaints, parking complaints, and homelessness.

Enforces a variety of federal, state, and local codes and regulations, including parking, noise abatement; writes warnings and citations; follows up on complaints.

Respond to dispatched calls for services. Investigate and complete reports related to “cold” calls including those involving missing persons, burglaries, vandalism, theft, financial crimes, stolen/recovered vehicles, fraud, and other similar incidents. Obtain statements and complete standard police reports for review by supervisors or sworn staff.

Respond to dispatched calls for injury and non-injury traffic crashes and assist in facilitating the exchange of information. Administer first aid as needed and conduct crash investigations as needed.

Complete documents and reports required by the City to include cases generated from online reporting.

Provide traffic control at various incidents, including potentially hazardous conditions, traffic accidents, crime scenes, fires, funerals, special events, and power outages.

### **20% Crime Prevention Outreach Duties**

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Under the direction of a police lieutenant:

Coordinate and schedule crime prevention/public relations programs including, but not limited to, Neighborhood Watch, Business Watch, National Night Out, and BLAST (Bringing Law Enforcement and Students Together) Camp.

Maintain crime prevention databases and ensures compliance with program requirements.

Support special events which may include developing visual aids and other items for public display.

Effectively interact with the community in person and via email/telephone correspondence; crime prevention liaison to various civic groups.

Listen and report community concerns and needs relative to law enforcement and community policing.

Create and maintains brochures, informational pamphlets, and crime prevention bulletins.

Offer community and city resource referrals and conducts department tours.

Recruit non-sworn volunteers.

## **20% Vehicle Fleet Service Duties (Not a Fleet Manager)**

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Under the direction of the Administrative Lieutenant:

Coordinate fleet services by assuring that vehicles and vehicle accessories are properly equipped, maintained and in good working order.

Schedule and transports vehicles and equipment to repair facilities and other service shops.

Perform minor maintenance checks, troubleshooting, and repairs as needed.

Commission and decommission vehicles, prepares vehicles for public auction.

Maintain accurate service records and complies with safety recall notices.

Recruit, train and schedule fleet service volunteers.

## **MINIMUM QUALIFICATIONS**

### **Education & Experience**

High school diploma or equivalency and two years' full-time experience, paid or unpaid, in one or more of the following; community outreach, communications, and public relations, or a similar field demonstrating a history of community involvement and project leadership and experience, or any equivalent combination of education and experience which provides the knowledge, skills, and abilities to perform the essential functions and responsibilities of the position.

### **Licenses, Certifications & Other Requirements**

- Pass a comprehensive background investigation.
- Valid Oregon Driver License at time of hire and maintained during employment.
- Must be able to provide credible testimony.

## **ADDITIONAL QUALIFICATIONS**

### **Knowledge**

- Verbal and written fluency in English language.
- Business English composition, spelling, and punctuation.
- Appropriate communication etiquette.
- Problem solving techniques.
- Standard computer applications and computer operation including proficiency in MS Office including Excel, Word, and PowerPoint.
- General law enforcement procedures, policies, and terminology or interest in and ability to rapidly acquire such knowledge.

### **Skill & Ability**

- Organize and evaluate a variety of information and take appropriate action.
- Speak and present information on the phone and in person to individuals and groups.
- Effectively utilize a variety of social media platforms.
- Familiarize and explain laws and statutes to citizens of varying backgrounds and educational levels.
- Assess priorities and efficiently prioritize tasks.
- Perform multiple duties simultaneously and accurately under strict timelines and stressful conditions.
- Exercise tact, diplomacy, and persuasion with diverse clientele; consistently demonstrate good customer service.
- Provide training to others and provide support to staff.
- Establish effective working relationships with the general public, vendors, and other City employees and volunteers.
- Possess the technical and communication skills to perform the essential functions of the position.
- Work independently with limited supervision.

### **Licenses, Certifications & Other Requirements**

- Required within six months of hire: NIMS IS 100, 200, and 700 Certifications.
- Required within 90 days of hire: Possession of Law Enforcement Data System (LEDS) certification and Criminal Justice Information Services (CJIS) clearance. Must be maintained during employment.
- Standard first aid & Adult and Child CPR Certification or able to obtain certification as soon as practicable.
- Experience with or ability to learn and effectively utilize a variety of social media platforms.
- Bi-lingual skills desirable.
- Wear department issued uniform.



# EXECUTIVE ASSISTANT

## Job Description

The job description does not constitute an employment agreement between the City and employee and is subject to change. The specific statements shown in each section of this description are not intended to be all-inclusive. They represent typical elements and criteria considered necessary to successfully perform the job.

<b>Class Title:</b>	Executive Assistant	<b>Effective Date:</b>	July 1, 2024
<b>Working Title:</b>	Executive Assistant	<b>Type:</b>	Non-Represented
<b>Department:</b>	Police	<b>Supervisor:</b>	Chief of Police
<b>FLSA Status:</b>	Non-Exempt	<b>Supervises:</b>	None

### CLASSIFICATION SUMMARY

This professional level staff assistant provides administrative and technical support to the Command Staff of the Police Department. Provides primary administrative assistance or consultation to other members. Has responsibility for receiving, handling, routing, or storing confidential, protected, or sensitive information. This position prepares policies, procedures, staff reports and other technical documents. Maintains police department files. Assists Command Staff and Human Resources (HR) in recruitment and hiring as well as employee and labor relations, including collective bargaining. Assignments involve the use of initiative and judgment in the independent conduct of work and are reviewed on the basis of results obtained. This position works under the supervision of the Chief of Police. Personal conduct and behavior (on-duty and off-duty) must be such that it builds public confidence in the agency and its members.

### SUPERVISION

Not a supervisory position.

### PHYSICAL DEMANDS – SAFETY – WORKING CONDITIONS

The physical demands (including lifting, mobility, movement and manual dexterity), work environment and working conditions described below are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

#### Physical Demands

In the performance of job duties, the employee is frequently required to sit; talk or hear; walk; use hands to finger, handle, or feel objects, tools, or controls; bend; and reach with hands and arms. The employee must lift and/or move up to 10 pounds and infrequently lift and/or move up to 30 pounds. Specific vision abilities required by this job include close, distance, color, and peripheral vision; depth perception; and the ability to adjust focus. Manual dexterity and coordination are required to perform the work. These abilities are necessary to use a computer and various software programs, calculator, phone, copy and fax machines, and other related tools and equipment.

#### Safety

Employees must maintain a safe work environment by complying with City and Department safety policies and rules and by practicing safety while performing the essential functions of the position.

#### Working Conditions

In the performance of the job duties, the employee will perform the majority of this job in an office environment under usual office working conditions. Work is also performed in numerous meeting settings in offices, conference rooms and public spaces. The noise level in the work area is typical of most office environments, with telephones, frequent interruptions and background noises. Duties include contact with employees and customers in conflict situations.

Occasional attendance at meetings or activities outside of normal working hours, including travel to local and regional meetings or conferences.

## ESSENTIAL FUNCTIONS – DUTIES & RESPONSIBILITIES

*An employee in this classification may perform any of the following duties; however, these examples do not include all the specific tasks which an employee may be expected to perform. Duties and responsibilities are subject to change by the employer as the needs of the employer and requirements of the job change.*

It is the responsibility of every employee to represent the City of Keizer by responding to the public, citizens, its employees, and others promptly, professionally and with courtesy. This includes regarding everyone, internal and external, as a customer and delivering the best service possible in a respectful and patient manner. Additional responsibilities include assisting other staff in the performance of their duties as assigned, maintaining regular job attendance and adherence to working hours, and operating a motor vehicle safely and legally while on City business.

### **25% Administrative Duties**

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Handle confidential and sensitive information/documents with discretion exercised in releasing such information.

Assist department members, public, and staff from other city departments regarding finance, human resources, and information technology (IT) matters specific to the Police Department.

Compose, type, edit, and proofread a variety of documents including forms, charts, memos, reports, statistical reports, informational handouts and other correspondence from rough draft, handwritten copy, verbal instructions, or other material ensuring proper content, layout, grammatical composition, and punctuation.

Update and retrieve information from a variety of databases. Perform online research and assist in research and preparation of statistical reports, personnel reports, budgets, and other confidential tasks.

Prepare staff reports, statistical reports, and other documents for distribution to department staff, City Manager, City Council, etc.

Compose, process, and maintain department orders and directives.

Research grant opportunities, write grant requests, coordinate and submit grant reports in a timely manner. Manage approved grants, report on progress, help ensure compliance with program requirements, prepare and submit drawdown requests.

Maintain administrative appointment schedule and make travel arrangements.

Respond to inquiries and/or complaints from other employees and the general public on the phone, on-line, and in person; provide desired information or refer to appropriate resource.

Act as liaison between Police Department, other City departments, and staff as well as vendors.

Establish and maintain Police Department administrative files and records management systems, control records, and indexes in accordance with state records rules.

Monitor department performance evaluation system, ensure timely preparation by supervisors, and assist with processing personnel action forms.

Provide administrative support to the Chief of Police and the Police Department's bargaining team in preparation for, during, and after collective bargaining; primary responsibility for accurate and timely documentation throughout the process; also contribute information where appropriate and requested. Assist managers and members in adhering to provisions of Keizer Police Association (KPA) collective bargaining agreement (CBA).

Act as recording secretary for department staff meetings and prepare/distribute minutes of meetings.

Maintain files/records of department volunteers.

Coordinate facility repairs and installation of equipment as necessary. Work with vendors and contractors on police department requests for service or products.

Maintain department web page.

Receive and screen visitors and telephone calls for command staff; provide information and handle issues that may require sensitivity and the use of sound independent judgment.

## **25% Recruitment, Hiring/Promotion and Employee Orientation**

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Administer regular, volunteer (reserve officer and cadet), promotion and assignment recruitment processes for the department. Partner with HR staff and department staff to ensure hiring and promotion practices are in accordance with all applicable federal, state, and local laws, and meet the parameters outlined in the City's and department's policy manuals.

Develop and post internal assignment and promotion announcements. Assist HR staff with announcements for Police Department external position recruitments.

Determine dates and schedule facilities for testing and interviews, including reserving equipment and ordering test materials.

Review employment applications, coordinate with and notify applicants and staff of all aspects of hiring process activities. Inform involved staff of relevant dates. Schedule and proctor police officer testing. Compile and analyze test and interview statistics and prepare reports.

Schedule interviews. Coordinate background investigations, schedule pre-employment psychological exam, medical, and drug screening appointments for candidates.

Coordinate development of interview materials and rating criteria.

Maintain recruitment files while recruitments are in progress, ensure transition of files to HR upon conclusion of the recruitment.

Conduct department employee orientations.

Complete and submit appropriate documents and forms to Department of Public Safety Standards and Training (DPSST). coordinate Personnel Action Forms (PAF) to ensure compliance with City and CBA requirements.

Respond to routine requests for information about department hiring process.

Coordinate transition of departing department personnel.

## **20% Purchasing Duties**

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Utilize best methods, including public contracts, to obtain goods in cost effective manner for a public agency.

Contact vendors to obtain proposals/bids on certain supply and operating materials, and make recommendation for purchase to the supervisor in charge and/or Chief of Police.

Prepare purchase orders. Receive and process all receipts, purchase requests and invoices; verify accuracy.

As department quartermaster, procure and issue department uniforms, equipment, and other related items for department employees.

Maintain inventory control and procure department office supplies, materials, uniforms, equipment and other applicable property items.

## **20% Financial Duties**

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Verify department invoices for accuracy, code invoices with appropriate accounting number, obtain supervisor approval, and route to City Finance Department for timely payment.

Contact vendors regarding discrepancies with accounts payable.

Maintain accounts payable files.

Maintain multiple petty cash accounts/funds, conduct audits on funds.

Assist in development of departmental budget by providing documentation on expenses and analyzing data to project costs.

Monitor budget expenditures and revenues; review budget reports and provide recommendations on department spending.

## **10% Training Program Duties**

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Register employees for training, including arrangements for payment, lodging, travel, per diem, etc.

Maintain training files for internal and external department training.

Complete and transmit appropriate training forms to DPSST.

Monitor DPSST training and certification requirements for department personnel.

Assist vendors/instructors when scheduling or setting up city facility to provide training programs.

Audit officer training records to ensure all training is documented.

## **MINIMUM QUALIFICATIONS**

### **Education & Experience**

High school graduate or equivalency, plus six years of full-time progressively responsible experience in a staff professional/technical position with at least one-year full-time experience in a law enforcement/corrections/military environment, or any equivalent combination of education and experience which provides the knowledge, skills and abilities to perform the essential functions and responsibilities of the position.

### **Skill & Ability**

- Verbal and written fluency in English language.
- Must be able to provide credible sworn testimony.

### **Licenses, Certifications & Other Requirements**

- Pass a comprehensive background investigation.
- Required at time of appointment: Criminal Justice Information Services (CJIS) clearance or ability to obtain within 90 days and maintain during employment.

## **ADDITIONAL QUALIFICATIONS**

### **Knowledge**

- Governmental and particularly police operational practices, procedures, and methods.
- Research and study methodologies.
- Budget concepts and preparation.
- Business English, composition, spelling, and grammar.
- Accounting procedures. E.g. General understanding of budget practices, billing, handling petty cash, etc.
- Modern office administration and records management practices.
- Public purchasing, contracting laws and regulations, and government contracts and bids.

### **Skill & Ability**

- Proficiently use office equipment including computers; word processing programs, spreadsheet, and desktop publishing applications.
- Effectively communicate orally and in writing.
- Organize and prioritize multiple overlapping projects.
- Conduct analysis of data and information and perform complex data entry and calculations.
- Interpret and apply information in making decisions and providing information.
- Maintain professional integrity of sensitive and confidential information.
- Comprehend and interpret police policies and standard operating procedures, City ordinances, Oregon Revised Statutes (ORS), Oregon Administrative Rules (OAR), and federal laws.
- Establish and maintain effective working relationships with other employees, representatives of governmental and community agencies, and the public.
- Maintain fiscal responsibility when expending public funds.

### **Licenses, Certifications & Other Requirements**

- Possession of, or ability to obtain as soon as practicable after hire, and maintain during employment, Notary Public commission.
- Required within six months of hire: NIMS IS 100 and 700 Certifications.



# LIEUTENANT

## Job Description

*The job description does not constitute an employment agreement between the City and employee and is subject to change. The specific statements shown in each section of this description are not intended to be all-inclusive. They represent typical elements and criteria considered necessary to successfully perform the job.*

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<b>Class Title:</b>	Lieutenant	<b>Effective Date:</b>	September 1, 2019
<b>Working Titles:</b>	Administrative Lieutenant, Patrol Lieutenant, Investigations Lieutenant, Support Lieutenant	<b>Type:</b>	Management/Supervisory
<b>Department:</b>	Police	<b>Supervisor:</b>	Chief of Police
<b>FLSA Status:</b>	Exempt	<b>Supervises:</b>	Sergeants, Support Services Supervisor, Police Officers, Crime Analyst, Non-Sworn Employees, Volunteers

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### CLASSIFICATION SUMMARY

The Lieutenant holds a senior level management position, overseeing administrative programs, operations and activities of a division of the Police Department through subordinate supervisors and other personnel. This position provides highly responsible and complex staff assistance to the Chief of Police. Acts in the capacity of the Chief of Police during their absence. This position works with and at the direction of the Chief of Police to manage all subordinate functions of the police department; ensuring activities are consistent with community and industry standards and expectations and in keeping with the mission of the Police Department. Personal conduct and behavior (on-duty and off-duty) must be such that it builds public confidence in the agency and its members.

### SUPERVISION

This is a supervisory position. This position supervises assigned employees, which includes: scheduling and assigning work; mentoring, coaching, and training; developing work plans and reviewing work for completion; evaluating performance and providing necessary feedback to employees; setting work standards; imposing or effectively recommending necessary disciplinary action; responding to grievances; and making or effectively recommending hiring and termination decisions.

### PHYSICAL & MENTAL DEMANDS – SAFETY – WORKING CONDITIONS

*The physical demands (including lifting, mobility, movement and manual dexterity), work environment and working conditions described below are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

#### Physical & Mental Demands

Mental alertness is important because of the need to make fine discriminations and decisions concerning subtle cues of impending danger or to discover inconsistencies in witnesses or situations changing dramatically within a few seconds, taxing the maximum of human endurance. Therefore, incumbents must remain physically and mentally fit to enable them to handle current contacts and involvement with dangerous and potentially dangerous people, animals and equipment, using only that amount of force that reasonably appears necessary, given the facts and circumstances perceived by the officer at the time of the event, to effectively bring an incident under control.

#### Safety

Employees must maintain a safe work environment by complying with City and Department safety policies and rules and by practicing safety while performing the essential functions of the position. This supervisory position is responsible to actively support safety and loss control measures for the City as a whole and to maintain accountability for safety and loss control issues within the department.

## **Working Conditions**

In order to interface with and be available to all subordinate personnel, the Police Lieutenant may work various shifts. Incumbents are expected to attend meetings and other functions during regular business hours and evenings. Lieutenants will experience call-outs at various hours around the clock, seven days per week, and are expected to work outside normal work hours as needed and without prior notice.

Working conditions will vary. Although tasks are performed primarily indoors in an office environment, some tasks will be performed outside, often working from an emergency response vehicle in varying and sometimes extreme weather conditions. The positions of Administrative Lieutenant, Patrol Lieutenant, and Support Lieutenant are primarily uniformed positions; however, meetings and other functions may dictate that civilian clothing be worn. The position of Criminal Investigations Lieutenant is primarily a non-uniformed position; however, s/he is expected to maintain a uniform and wear it occasionally. Duties include risk of exposure to bloodborne pathogens and disease.

## **ESSENTIAL FUNCTIONS – DUTIES & RESPONSIBILITIES**

*An employee in this classification may perform any of the following duties; however, these examples do not include all the specific tasks which an employee may be expected to perform. Duties and responsibilities are subject to change by the employer as the needs of the employer and requirements of the job change.*

It is the responsibility of every employee to represent the City of Keizer by responding to the public, citizens, its employees, and others promptly, professionally and with courtesy. This includes regarding everyone, internal and external, as a customer and delivering the best service possible in a respectful and patient manner. Additional responsibilities include assisting other staff in the performance of their duties as assigned, and operating a motor vehicle safely and legally while on City business.

### **100% Job Duties**

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Provides progressive and responsive leadership to the Police Department.

Supervises subordinate employees in their assigned duties including assigning work, training, evaluating performance, taking necessary disciplinary action, employee development, and recommending hiring and termination decisions.

Responsible for scheduling and coordination of personnel. Schedules and conducts meetings. Makes day-to-day police assignments as required by the needs of the service. Determines how to deploy personnel during emergency responses.

Monitors employee activity and equipment operations to ensure safety practices; implements and maintains safe operating practices; assures compliance with proper safety procedures, rules, and regulations.

Maintains department equipment and facilities. Analyzes and recommends improvements to equipment and facilities, as needed.

Oversees and may personally participate in investigating major criminal law violations occurring within the jurisdiction of the Department, obtaining evidence and compiling information regarding these crimes, preparing cases for filing of charges, testifying in court, and related activities.

Must be able to provide credible sworn testimony.

Provides budget analysis and recommendations; drafts and prepares the annual budget in area(s) of responsibility; reviews and monitors expenditures to remain within established budgetary constraints.

Prepares a variety of reports and records. Reviews a variety of police-related reports prepared by subordinate officers or others. Reviews, evaluates, and develops programs, policies, and procedures for various department operations.

Coordinates activities with supervisors or other City departments, exchanges information with officers in other law enforcement agencies, and obtains advice from the City Attorney, regarding cases, policies, and procedures.

Monitors and observes investigative activities to ensure that conduct and performance conforms to department standards.

Coordinates the resolution of inquiries, complaints, problems, or emergencies affecting the availability or quality of services. Responds to sensitive or complex inquiries or service complaints.

Maintains contact with police supervisory personnel to coordinate investigation activities, provide mutual assistance during emergency situations, and provide general information about department activities.

Maintains contact with general public, court officials, and other city officials in the performance of police activities.

Maintains regular job attendance and adherence to working hours. Maintains normal availability by radio or telephone for consultation on major emergencies or precedent.

Oversees and assists, as needed, in the patrol of city streets, parks, and commercial and residential areas to preserve the peace, enforce the law, control vehicular traffic, prevent or detect, and investigate misconduct involving misdemeanors, felonies, and other law violations and otherwise serve and protect.

Oversees and assists, as needed, in the response to emergency radio calls; investigates accidents, robberies, civil disturbances, domestic disputes, fights, drunkenness, missing children, prowlers, abuse of drugs, etc. Takes appropriate law enforcement action.

Operates a motor vehicle safely and legally.

Establishes goals, objectives, and philosophies for training.

Provides staff input to City Council and Council Committees as assigned.

Informs the Chief of Police of information or actions within the assigned division.

Participates in determining facts of administrative/internal investigations involving officer involved shootings, accidents, etc. and ensures compliance with laws and Departmental policies. Issues discipline and/or makes recommendations to the Chief of Police for disciplinary action arising from such investigations for assigned divisions, as set forth below. Conducts internal affairs investigations regarding possible officer misconduct.

### **Patrol Lieutenant**

The Patrol Division includes four patrol squads and the Community Response Unit (CRU), the Reserve Officer Unit, Police Cadet Unit, and volunteers. Primary responsibilities include managing patrol and CRU teams and members in their proficiency, including their understanding and deployment of modern policing strategies and methods, and in the use of those strategies and methods to identify and solve persistent crime and livability problems in the community. Similarly, neighborhood and business relations, including programs similar to Neighborhood Watch, are the responsibility of the Patrol Lieutenant.

### **Investigations Lieutenant**

The Investigations Division includes Detectives and the Crime Analyst. Primary responsibility is to manage the division members in their proficiency, including their understanding and deployment of modern policing strategies and methods of investigation and analysis. Works cohesively with the Patrol Lieutenant to seek out and support department focus toward problem oriented policing.

### **Support Lieutenant**

The Support Division includes the School Resource Officer Unit, Traffic Safety Unit, Support Services Unit, and volunteers. Primary responsibilities include managing the division members in their proficiency, including their understanding and deployment of modern policing strategies and methods, and material and technological support to the department, including but not limited to vehicle maintenance; all technologies, including mobile data, record management systems, electronic citations, and radio upgrades and maintenance; and facilities management, including in-custody compliance. Works cohesively with the Patrol Lieutenant to seek out and support department focus toward problem oriented policing.

### **Administrative Lieutenant**

Administration includes the Chief of Police, the Administrative Assistant, and the Administrative (Admin) Lieutenant. Primary responsibilities include highly responsible and complex administrative assistance to the Chief of Police, including performing such duties as public information officer, risk management, internal affairs administration, coordination of recruitment and hiring, coordination of training, and similar administrative duties. The Admin Lieutenant is not in the chain of command and does not have assigned supervision of subordinate members but possesses the authority of a lieutenant to direct personnel as needed. Because the Admin Lieutenant has a department-wide view of personnel and agency performance, the Admin Lieutenant works cohesively with the Patrol, Investigations and Support Lieutenants (Division Commanders), providing support regarding performance trends, recurring policy violations, and similar topics.

## **MINIMUM QUALIFICATIONS**

### **Education & Experience**

Associate degree from an accredited college or university in law enforcement, criminal justice administration, police science, social sciences, or similarly related field, and eight or more years of law enforcement experience; or any equivalent combination of education and experience which provides the knowledge, skills and abilities to perform the essential functions and responsibilities of the position.

**Skill & Ability**

- Verbal and written fluency in the English language.
- Must be able to provide credible sworn testimony.

**Licenses, Certifications & Other Requirements**

- United States citizen.
- 21 years of age at time of appointment.
- Free of criminal convictions defined by Oregon Administrative Rule.
- Be of good moral character.
- Pass the Pre-Background Screening (Integrity Interview).
- Pass a comprehensive background investigation.
- Pass medical and psychological evaluations.

**Must possess**

- Oregon Department of Public Safety Standards and Training (DPSST) Advanced Certification (out of state candidates must obtain within 1 year after appointment).
- Must have or be able to obtain Oregon DPSST Management Certification upon completion of two years of service in the position.
- Valid driver license at time of hire and maintained during employment.
- Required at time of appointment: possession of Law Enforcement Data System (LEDS) certification and Criminal Justice Information Services (CJIS) clearance or must obtain both within 90 days. Must be maintained during employment.

**ADDITIONAL QUALIFICATIONS****Knowledge**

- Practices, principles, and procedures of police administration, criminal investigation.
- Safety regulations, procedures, and practices in law enforcement.
- City, state, and federal laws and regulations pertaining to police service.
- Fiscal management including budget preparation, expenditure control, and record keeping.
- Management and supervisory principles, practices, and methods.
- Modern methods and techniques used in prevention, investigation, and suppression of criminal activities.

**Skill & Ability**

- Plan, organize, and oversee assigned work programs including monitoring work schedules and evaluating the work of subordinates.
- Develop division or unit goals and objectives.
- Analyze and evaluate operations and develop and implement corrective action to resolve problems.
- Establish and maintain effective working relationships with managers, supervisors, and employees.
- Communicate effectively, both orally and in writing, regarding complex or sensitive issues.
- Operate assigned firearms and equipment skillfully, safely, and in conformance with applicable laws and regulations.
- Perform effectively in emergency and stressful situations.

**Licenses, Certifications & Other Requirements**

- Required within six months of promotion or hire: NIMS ICS 100, 200, 700, and 800 Certifications.
- Required within two years of promotion or hire: NIMS ICS 300 and 400 Certification.



# POLICE OFFICER

## Job Description

*The job description does not constitute an employment agreement between the City and employee and is subject to change. The specific statements shown in each section of this description are not intended to be all-inclusive. They represent typical elements and criteria considered necessary to successfully perform the job.*

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<b>Class Title:</b>	Police Officer	<b>Effective Date:</b>	July 1, 2022
<b>Working Title:</b>	Police Officer	<b>Type:</b>	Represented by Keizer Police Association
<b>Department:</b>	Police	<b>Supervisor:</b>	Sergeant
<b>FLSA Status:</b>	Non-Exempt	<b>Supervises:</b>	None

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### CLASSIFICATION SUMMARY

This position requires a high level of problem-solving ability, self-initiative, and the ability to work independently in conformance with established guidelines and standards. Successful performers are those who are capable and willing to make decisions that are consistently in conformance with the agency's mission, goals, and objectives. All assigned duties and tasks are expected to be performed in an effective, efficient, and safe manner. Personal conduct and behavior (on-duty as well as off-duty) must be such that it builds public confidence in the agency and its members.

### SUPERVISION

Not a supervisory position.

### PHYSICAL & MENTAL DEMANDS – SAFETY – WORKING CONDITIONS

*The work environment/physical demands described are representative of those an employee may encounter while performing the essential functions of this position. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

#### Physical & Mental Demands

Mental alertness is important because of the need to make fine discriminations and decisions concerning subtle cues of impending danger or to discover inconsistencies in witnesses or situations changing dramatically within a few seconds, taxing the maximum of human endurance. Therefore, incumbents must remain physically and mentally fit to enable them to handle recurrent contacts and involvement with dangerous and potentially dangerous people, animals, and equipment, using only that amount of force that reasonably appears necessary, given the facts and circumstances perceived by the officer at the time of the event, to effectively bring an incident under control.

#### Safety

Employees must maintain a safe work environment by complying with City and Department safety policies and rules and by practicing safety while performing the essential functions of the position.

#### Working Conditions

Work conditions may vary by shift. Some tasks are performed in an office setting with a noise level that is usually moderately quiet and some tasks are performed outside from a police vehicle. Few tasks require heavy lifting, pushing, pulling, or carrying heavy loads. Physical strength, agility, and stamina sufficient to perform the duties, including work beyond normal requirements in emergencies are required. Flexibility is important because of the need to frequently enter and exit vehicles, inspect buildings, climb over and around obstacles, make sudden moves, etc. Duties include risk of exposure to bloodborne pathogens and disease.

## ESSENTIAL FUNCTIONS – DUTIES & RESPONSIBILITIES

*An employee in this classification may perform any of the following duties; however, these examples do not include all the specific tasks which an employee may be expected to perform. Duties and responsibilities are subject to change by the employer as the needs of the employer and requirements of the job change.*

It is the responsibility of every employee to represent the City of Keizer by responding to the public, citizens, its employees, and others promptly, professionally and with courtesy. This includes regarding everyone, internal and external, as a customer and delivering the best service possible in a respectful and patient manner. Additional responsibilities include assisting other staff in the performance of their duties as assigned, maintaining regular job attendance and adherence to working hours, and operating a motor vehicle safely and legally while on City business.

### 100% Job Duties

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Patrols city streets, parks, commercial and residential areas, school zones, and high activity areas. Conducts building security checks, checks for suspicious persons and vehicles. Preserves the peace, enforces the law, controls vehicular traffic, prevents or detects and investigates misconduct involving misdemeanors, felonies, and other law violations. Issues citations or warnings to violators.

Responds to a wide variety of radio calls including thefts, juvenile complaints, burglaries, trespass, rapes, family disputes, barking dogs, loud parties, emotionally disturbed persons, civil complaints, miscellaneous non-criminal calls, etc. and takes appropriate action. Performs first-responder emergency care at the scene of traffic crashes and directs traffic as necessary.

Attempts to build an atmosphere of mutual respect and trust with the community, so average citizens and community leaders form partnerships with the police.

Works with community residents to identify problems.

Assist the public in answering inquiries regarding directions, laws, and ordinances, aids stranded motorists; conducts vacation house checks, checks road conditions, street signs, and street lights and reports defects, gives other assistance to the public as needed.

Investigates traffic crashes and criminal complaints, makes arrests, and issues criminal citations when required. Handles and transports detainees.

Prepares complete and accurate documents as required.

Appears in court as a witness with prior work being done on the preparation of the court case in conjunction with superior officers and various attorneys.

Must be able to provide credible sworn testimony.

Conducts special projects and research to assist in department's activities in areas such as crime analysis, planning for new or improved programs, and computer applications.

## MINIMUM QUALIFICATIONS

### Education & Experience

High school graduate or GED equivalency.

### Skill & Ability

- Verbal and written fluency in the English language.
- Must be able to provide credible sworn testimony.

### Licenses, Certifications & Other Requirements

- United States citizen.
- 21 years of age at time of appointment.
- Free of criminal convictions defined by Oregon Administrative Rule.
- Be of good moral character.
- Pass the Police Officer Standard Testing (POST), an entry-level skills test (arithmetic, reading comprehension, grammar, and incident report writing).
- Pass the Oregon Physical Agility Test (ORPAT).
- Pass the Pre-Background Screening (Integrity Interview).
- Pass a comprehensive background investigation.
- Pass medical and psychological evaluations.
- Valid driver license at time of hire and maintained during employment.

- Required at time of appointment: possession of Law Enforcement Data System (LEDS) certification and Criminal Justice Information Services (CJIS) clearance or must obtain both within 90 days. Must be maintained during employment.

## **ADDITIONAL QUALIFICATIONS**

### **Skill & Ability**

- Work independently and make sound decisions using good common sense.
- Understand fairly complex oral and written instructions and act upon them accordingly.
- Deal courteously yet firmly with the public when required.
- Establish and maintain effective working relationships with fellow employees and supervisors.
- Analyze situations quickly and objectively and determine a proper course of action to be taken.
- Learn a considerable amount of material such as laws, statutes, regulations, ordinances, and procedures and apply this knowledge to the job.
- Operate assigned firearms and equipment skillfully, safely and in conformance with applicable laws and regulations.
- Prepare full and comprehensive reports.
- Perform effectively in emergency and stressful situations.

### **Licenses, Certifications & Other Requirements**

- Standard first aid & Adult and Child CPR Certification or able to obtain certification as soon as practicable.
- Required within six months of hire: NIMS IS 100 and 700 Certifications.
- Generally, the department has no overall residency requirement; however, certain special duty assignments require a minimum response time, and all members are required to be able to tend to their duties responsibly and within a reasonable amount of time.



# POLICE SUPPORT SPECIALIST

## Job Description

*The job description does not constitute an employment agreement between the City and employee and is subject to change. The specific statements shown in each section of this description are not intended to be all-inclusive. They represent typical elements and criteria considered necessary to successfully perform the job.*

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<b>Class Title:</b>	Police Support Specialist	<b>Effective Date:</b>	July 1, 2021
<b>Working Title:</b>	Police Support Specialist	<b>Type:</b>	Represented by Keizer Police Assoc.
<b>Department:</b>	Police	<b>Supervisor:</b>	Support Services Supervisor
<b>FLSA Status:</b>	Non-Exempt	<b>Supervises:</b>	None

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### CLASSIFICATION SUMMARY

This front office position is responsible for complex, clerical, and technical work involving extensive computer entry, retrieval, and distribution of sensitive and confidential information, front office reception, providing customer service and resources to citizens, employees, and other agencies both in person and by telephone and responsible for receiving, routing, filing and computer entry of all police incident reports and associated documents in a timely manner. The position utilizes accurate and established filing and database methods and coding to ensure accurate, complete, and detailed records of events and to enable retrieval of information as needed for criminal justice purposes. Personal conduct and behavior (on-duty and off-duty) must be such that it builds public confidence in the agency and its members.

### SUPERVISION

Not a supervisory position.

### PHYSICAL DEMANDS – SAFETY – WORKING CONDITIONS

*The physical demands (including lifting, mobility, movement, and manual dexterity), work environment and working conditions described below are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

#### Physical Demands

In the performance of job duties, the employee is frequently required to sit; talk or hear; walk; use hands to finger, handle, or feel objects, tools, or controls; bend; and reach with hands and arms. The employee must lift and/or move up to 30 pounds and infrequently lift and/or move up to 50 pounds. Specific vision abilities required by this job include close, distance, color and peripheral vision; depth perception; and the ability to adjust focus. Manual dexterity and coordination are required to perform the work. These abilities are necessary to use a computer and various software programs, calculator, phone, copy and fax machines, and other related tools and equipment.

#### Safety

Employees must maintain a safe work environment by complying with City and Department safety policies and rules and by practicing safety while performing the essential functions of the position.

#### Working Conditions

In the performance of the job duties, the employee will perform the majority of this job in an office environment under usual office working conditions. Work is also performed in numerous meeting settings in offices, conference rooms, and public spaces. The noise level in the work area is typical of most office environments, with telephones, frequent interruptions, and background noises. Duties include contact with employees and members of the public in conflict situations.

May occasionally work in outside weather conditions with moderate noise levels. Risk of exposure to bloodborne pathogens and disease. Occasional overtime may be required.

## **ESSENTIAL FUNCTIONS – DUTIES & RESPONSIBILITIES**

*An employee in this classification may perform any of the following duties; however, these examples do not include all the specific tasks which an employee may be expected to perform. Duties and responsibilities are subject to change by the employer as the needs of the employer and requirements of the job change.*

It is the responsibility of every employee to represent the City of Keizer by responding to the public, citizens, its employees, and others promptly, professionally and with courtesy. This includes regarding everyone, internal and external, as a customer and delivering the best service possible in a respectful and patient manner. Additional responsibilities include assisting other staff in the performance of their duties as assigned, maintaining regular job attendance and adherence to assigned working hours, and operating a motor vehicle safely and legally while on City business.

### **100% Job Duties**

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Receives and disseminates information, requests, and other communications from the general public, other governmental agencies, and to appropriate department personnel in a timely and concise manner; receives and distributes departmental written communications and daily mail.

Receives calls for service and dispatches low-priority calls.

Receives requests for police reports and collects fees for same. May independently process such requests and/or route/mail copies of approved incident reports and related documents to appropriate requestors, outside agencies, applicable courts, insurance companies, and citizens.

Processes Impounded Vehicle Notices, collects fees, and related documentation per City ordinance.

Processes registered Sex Offenders, photographing, and documenting their identity and residence and reporting data to the Oregon State Police.

Performs background requests for police clearance letters, military service, other law enforcement and government agencies, etc. as directed.

Receives and manages the day-to-day flow of paperwork throughout Support Services; assists department members in locating written and computerized information as requested.

Enters police reports and traffic citations into the records management system ensuring accuracy and quality of each record.

Enters, updates, and removes data for missing persons, stolen vehicles, stolen and recovered property, etc. into State and National Computer Systems as required.

Maintains Officer Court Calendar and distributes subpoenas to personnel ordered to appear before the courts, in a timely manner.

Performs document imaging process for record retention and retrieval.

Assists in training new personnel.

Participates in the purging and archiving of police files at the direction of the Support Services Supervisor.

Directs activities of volunteers within Support Services as necessary and acts as Notary Public if properly trained/certified to do so.

Participates in community policing activities and goals.

May act as Law Enforcement Data System (LEDS) representative / Criminal Justice Information Standards (CJIS) Terminal Agency Coordinator.

May provide support for Property and Evidence as needed.

## **MINIMUM QUALIFICATIONS**

### **Education & Experience**

High School Diploma or equivalency and a minimum of two years of experience in a police records or public safety environment or any equivalent combination of education and experience that provides the knowledge, skills, and abilities to perform the essential functions and responsibilities of the position.

**Skill & Ability**

- Verbal and written fluency in English language.

**Licenses, Certifications & Other Requirements**

- Pass a comprehensive background investigation.

**ADDITIONAL QUALIFICATIONS****Knowledge**

- Ordinances, statutes, laws, policies, and procedures related to document processing and police records.
- Protocols and administrative rules for release of information contained in various databases and systems.
- General law enforcement procedures, policies, and terminology.
- Confidentiality with excellent judgment in regard to disclosure issues.
- Business English composition, spelling, and punctuation.
- Modern office operations and equipment, including accurate keyboarding with proven computer skills in data entry, word processing, database, and spreadsheet applications.

**Skill & Ability**

- Effectively communicate orally and in writing with public and interdepartmental contacts.
- Explain complex laws and statutes to persons of varying backgrounds and educational levels.
- Operate, extract, and input data from and into multiple computer systems with a high level of keyboarding accuracy. Demonstrate high levels of proficiency with Law Enforcement and Criminal Justice computer programs.
- Perform multiple duties simultaneously and accurately under strict timelines and stressful conditions.
- Assess priorities and efficiently prioritize tasks.
- Maintain confidentiality.
- Diffuse difficult situations; deal with angry or hostile persons of varying backgrounds, educational levels, and mental statuses.
- Exercise tact, diplomacy, and persuasion with diverse customer base.

**Licenses, Certifications, & Other Requirements**

- Required at time of appointment: possession of Law Enforcement Data System (LEDS) certification and Criminal Justice Information Services (CJIS) clearance or must obtain both within 90 days. Must be maintained during employment.
- Required within six months of hire: NIMS IS 100 and 700 certifications.
- Bi-lingual skills desirable.



# PROPERTY AND EVIDENCE SPECIALIST I

## Job Description

*The job description does not constitute an employment agreement between the City and employee and is subject to change. The specific statements shown in each section of this description are not intended to be all-inclusive. They represent typical elements and criteria considered necessary to successfully perform the job.*

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<b>Class Title:</b>	Property and Evidence Specialist I	<b>Effective Date:</b>	October 1, 2024
<b>Working Title:</b>	Property and Evidence Specialist I	<b>Type:</b>	Represented by Keizer Police Assoc.
<b>Department:</b>	Police	<b>Supervisor:</b>	Support Services Supervisor
<b>FLSA Status:</b>	Non-Exempt	<b>Supervises:</b>	None

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### CLASSIFICATION SUMMARY

Under the general direction of the Police Support Specialist Supervisor and the lead of the Property and Evidence Specialist II, this position is responsible for all phases of property and evidence control in a highly secure environment. This position will also perform other assigned duties within the general scope of the Support Services Unit. These other assigned duties will be determined by the unit supervisor and may vary depending upon operational needs. Personal conduct and behavior (on-duty and off-duty) must be such that it builds public confidence in the agency and its members.

### SUPERVISION

Not a supervisory position.

### PHYSICAL DEMANDS – SAFETY – WORKING CONDITIONS

*The physical demands (including lifting, mobility, movement and manual dexterity), work environment and working conditions described below are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

#### Physical Demands

In the performance of job duties, the employee is frequently required to sit; talk or hear; walk; use hands to finger, handle, or feel objects, tools, or controls; bend; stoop; and reach with hands and arms. The employee must lift and/or move up to 25 pounds and infrequently lift and/or move up to 50 pounds. Specific vision abilities required by this job include close, distance, color, and peripheral vision; depth perception; and the ability to adjust focus. Manual dexterity and coordination are required to perform the work. These abilities are necessary to use a computer and various software programs including law enforcement databases, calculator, phone, copy and fax machines, and other related tools and equipment. Mental alertness is important due to the specialized nature of the work involved. The ability to exercise discretion and judgment and to maintain confidentiality is imperative.

#### Safety

Employees must maintain a safe work environment by complying with City and Department safety policies and rules and by practicing safety while performing the essential functions of the position.

#### Working Conditions

In the performance of the job duties, the employee will perform the majority of this job in a non temperature controlled warehouse and office environment under usual office working conditions with occasional work performed outside in all types of weather conditions. The noise level in the work area is typical of most office environments, with telephones, frequent interruptions and background noises, but can be moderately noisy while in the field. Duties include contact with employees, other government agencies and members of the public in conflict situations and risk of exposure to bloodborne pathogens and disease.

Occasional work performed off-site in all types of weather conditions. Overtime may occur.

## **ESSENTIAL FUNCTIONS – DUTIES & RESPONSIBILITIES**

*An employee in this classification may perform any of the following duties; however, these examples do not include all the specific tasks which an employee may be expected to perform. Duties and responsibilities are subject to change by the employer as the needs of the employer and requirements of the job change.*

It is the responsibility of every employee to represent the City of Keizer by responding to the public, citizens, its employees, and others promptly, professionally and with courtesy. This includes regarding everyone, internal and external, as a customer and delivering the best service possible in a respectful and patient manner. Additional responsibilities include assisting other staff in the performance of their duties as assigned, maintaining regular job attendance and adherence to working hours, and operating a motor vehicle safely and legally while on City business.

### **95% Evidence & Property Duties**

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Responsible for all phases of property and evidence functions.

Utilizes extensive knowledge in the security, storage, retrieval and disposition of evidence, found & abandoned property, contraband, and property held for safekeeping. This may include potential exposure to biological / hazardous / explosive materials and items that may be sensitive in nature.

May be requested to accompany investigators to crime scenes for the purpose of logging and tracking evidence. May be subpoenaed to testify in court.

Accurately documents, maintains, and preserves records for all current and historical property and evidence from submission to final dispositions. This includes, but is not limited to all digital and physical evidence. Tracks and records all movements of evidence checked out for court, for analysis, to investigators and for disposal.

Prepares disposal manifests, court disposition requests, legal postings and financial documentation, and other required correspondence often requiring extensive research.

May at times be requested to oversee training and the direction of duties of Property & Evidence temporary staff and/or volunteers.

Utilizes and proficiently performs computerized Bar-coding of all property and provides information to management or others as requested.

Assists the Property and Evidence Specialist II with routine audits and inventories.

Procures and maintains supplies and equipment pertaining to the handling, packaging, storing and disposal of property.

Transports evidence to and from crime labs or other agencies as needed and coordinates evidence viewings.

Processes prescription drug drop off materials, schedules and delivers to off-site disposal site.

Prepares items of evidence for court-required discovery and to fulfill public records requests.

Prior to firearm release, performs complete criminal history background check on owner for prohibitions.

Stays current with revised statutes and legal opinions pertaining to property and evidence control, technological advancements in storage, packaging and tracking methods and DNA science applicable to the property and evidence functions. Introduces and makes recommendations for improvement to management.

Provides routine disinfection and general housekeeping of secured restricted evidence warehouse, office, two processing areas, drying room and evidence garage.

### **5% Support Services Duties**

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Variable and within the scope of duties performed by the Support Services Unit. Assignment based upon operational need and may include one or more of the following support functions:

Customer Service

Police Report Routing / Processing

Data Entry

Impound Vehicle Processing including Fee Accounting

Other general office functions usually performed as a function of Support Services

## **MINIMUM QUALIFICATIONS**

### **Education & Experience**

High school Diploma or equivalency and two years of experience in a general office, communications, or records management position with at least one year in a public safety or criminal justice environment preferred or any equivalent combination of education and experience which provides the knowledge, skills, and abilities to perform the essential functions and responsibilities of the position.

### **Skill & Ability**

- Verbal and written fluency in English language.

### **Licenses, Certifications & Other Requirements**

- Pass a comprehensive background investigation.
- Valid driver license at time of hire and maintained during employment.

## **ADDITIONAL QUALIFICATIONS**

### **Knowledge**

- Effective practices, methods, and techniques for storing and recording criminal evidence and personal property.
- General law enforcement practices and procedures regarding evidence and personal property storage, retention, and disposition.
- General law enforcement procedures, policies, and terminology
- Records management and maintenance techniques and practices.
- Business English composition, spelling, and punctuation.
- Standard computer applications and computer operation.
- Basic office operations and equipment.

### **Skill & Ability**

- Familiarize and explain complex laws and statutes to clients of varying backgrounds and educational level.
- Communicate effectively, both orally and in writing.
- Organize and evaluate a variety of information and take appropriate action; ability to pay attention to detail.
- Learn modern methods of criminal investigation and evidence identification.
- Learn court procedures and rules of evidence in criminal law.
- Operate, extract, and input data from and into computer systems with a high level of keyboarding accuracy.
- Demonstrate high levels of proficiency with Law Enforcement and Criminal Justice computer programs.
- Plan, train, and lead designated employees in the completion of various projects
- Operate a variety of general office equipment.
- Exercise independent judgment and self-initiative.

### **Licenses, Certifications & Other Requirements**

- Required at time of appointment: possession of Law Enforcement Data System (LEDS) certification and Criminal Justice Information Services (CJIS) clearance or must obtain both within 90 days. Must be maintained during employment.
- Required within six months of hire: NIMS IS 100 and 700 certifications.
- Possess or be able to obtain International Association of Property and Evidence (IAPE) property & evidence certification within 3 years of performing the functions of the position.
- Bi-lingual skills desirable.



# PROPERTY AND EVIDENCE SPECIALIST II

## Job Description

*The job description does not constitute an employment agreement between the City and employee and is subject to change. The specific statements shown in each section of this description are not intended to be all-inclusive. They represent typical elements and criteria considered necessary to successfully perform the job.*

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<b>Class Title:</b>	Property and Evidence Specialist II	<b>Effective Date:</b>	April 1, 2022
<b>Working Title:</b>	Property and Evidence Specialist II	<b>Type:</b>	Represented by Keizer Police Assoc.
<b>Department:</b>	Police	<b>Supervisor:</b>	Support Services Supervisor
<b>FLSA Status:</b>	Non-Exempt	<b>Supervises:</b>	None

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### CLASSIFICATION SUMMARY

Under the general direction of the Police Support Specialist Supervisor, this position is responsible for all phases of property and evidence control in a highly secure environment. This position will also perform other assigned duties within the general scope of the Support Services Unit. These other assigned duties will be determined by the Unit Supervisor and may vary depending upon operational needs. Personal conduct and behavior (on-duty and off-duty) must be such that it builds public confidence in the agency and its members.

Performs as a lead worker to Property and Evidence Specialist I, temporary staff and volunteers; provides technical and non-technical training and guidance concerning work procedures; plans, assigns, and re-assigns work; monitors and approves work for completion and conformance with quality and safety standards; and provides informal assessment of workers' performance to the Support Services Supervisor. Assists and backs-up or assumes specific duties of Support Services Supervisor when needed.

### SUPERVISION

Not a supervisory position.

### PHYSICAL DEMANDS – SAFETY – WORKING CONDITIONS

*The physical demands (including lifting, mobility, movement and manual dexterity), work environment and working conditions described below are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

#### Physical Demands

In the performance of job duties, the employee is frequently required to sit; talk or hear; walk; use hands to finger, handle, or feel objects, tools, or controls; bend; stoop; and reach with hands and arms. The employee must lift and/or move up to 25 pounds and infrequently lift and/or move up to 50 pounds. Specific vision abilities required by this job include close, distance, color, and peripheral vision; depth perception; and the ability to adjust focus. Manual dexterity and coordination are required to perform the work. These abilities are necessary to use a computer and various software programs including law enforcement databases, calculator, phone, copy and fax machines, and other related tools and equipment. Mental alertness is important due to the specialized nature of the work involved. The ability to exercise discretion and judgment and to maintain confidentiality is imperative.

#### Safety

Employees must maintain a safe work environment by complying with City and Department safety policies and rules and by practicing safety while performing the essential functions of the position.

#### Working Conditions

In the performance of the job duties, the employee will perform the majority of this job in a warehouse and office environment under usual office working conditions with occasional work performed outside in all types of weather conditions. The noise level in the work area is typical of most office environments, with telephones, frequent interruptions and background noises, but can be moderately noisy while in the field. Duties include contact with employees, other

government agencies and members of the public in conflict situations and risk of exposure to bloodborne pathogens and disease. Occasional work performed off-site in all types of weather conditions. Overtime may occur.

## **ESSENTIAL FUNCTIONS – DUTIES & RESPONSIBILITIES**

*An employee in this classification may perform any of the following duties; however, these examples do not include all the specific tasks which an employee may be expected to perform. Duties and responsibilities are subject to change by the employer as the needs of the employer and requirements of the job change.*

It is the responsibility of every employee to represent the City of Keizer by responding to the public, citizens, its employees, and others promptly, professionally and with courtesy. This includes regarding everyone, internal and external, as a customer and delivering the best service possible in a respectful and patient manner. Additional responsibilities include assisting other staff in the performance of their duties as assigned, maintaining regular job attendance and adherence to working hours, and operating a motor vehicle safely and legally while on City business.

### **95% Evidence & Property Duties**

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Responsible for all phases of property and evidence functions.

Utilizes extensive knowledge in the security, storage, retrieval and disposition of evidence, found & abandoned property, contraband, and property held for safekeeping. This may include potential exposure to biological / hazardous / explosive materials and items that may be sensitive in nature.

May be requested to accompany investigators to crime scenes for the purpose of logging and tracking evidence. May be subpoenaed to testify in court.

Accurately documents, maintains and preserves records for all current and historical property and evidence from submission to final dispositions. This includes, but is not limited to all digital & physical evidence. Tracks and records all movements of evidence checked out for court, for analysis, to investigators and for disposal.

Prepares disposal manifests, court disposition requests, legal postings and financial documentation, and other required correspondence often requiring extensive research. Maintains and updates the Property and Evidence Operations Manual.

Trains and directs duties of Property & Evidence regular and temporary staff and/or volunteers. Trains and instructs Police Officers with proper property/evidence procedures.

Utilizes and proficiently performs computerized Bar-coding of all property and provides information to management or others as requested.

Performs and/or manages routine audits and inventories in accordance with department policy.

Serves as Laboratory Online Information System (LOIS) Administrator.

Procures and maintains supplies and equipment pertaining to the handling, packaging, storing and disposal of property.

Transports evidence to and from crime labs or other agencies as needed and coordinates evidence viewings.

Processes prescription drug drop off materials, schedules and delivers to off-site disposal site.

Prepares items of evidence for court-required discovery and to fulfill public records requests.

Prior to firearm release, performs complete criminal history background check on owner for prohibitions. Stays current with revised statutes and legal opinions pertaining to property and evidence control, technological advancements in storage, packaging and tracking methods and DNA science applicable to the property and evidence functions. Introduces and makes recommendations for improvement to management.

Provides routine disinfection and general housekeeping of secured restricted evidence warehouse, office, two processing areas, drying room and evidence garage.

Represents the property and evidence room in meetings with management to include work groups within and outside the agency.

Produces an annual report that outline statistics, project completion and goal setting.

Ensures accuracy of the records management system as it pertains to evidence, troubleshooting system problems and errors, and working with systems support to achieve resolution.

## **5% Support Services Duties**

Variable and within the scope of duties performed by the Support Services Unit. Assignment based upon operational need and may include one or more of the following support functions:

- Customer Service
- Police Report Routing / Processing
- Data Entry
- Impound Vehicle Processing including Fee Accounting
- Other general office functions usually performed as a function of Support Services

## **MINIMUM QUALIFICATIONS**

### **Education & Experience**

High school Diploma or equivalency and three years of progressively responsible experience in a professional/technical position with at least one year in a public safety environment, preferably in property and evidence or any equivalent combination of education and experience which provides the knowledge, skills, and abilities to perform the essential functions and responsibilities of the position.

### **Skill & Ability**

- Verbal and written fluency in English language.

### **Licenses, Certifications & Other Requirements**

- Pass a comprehensive background investigation.
- Valid driver license at time of hire and maintained during employment.

## **ADDITIONAL QUALIFICATIONS**

### **Knowledge**

- Effective practices, methods, and techniques for storing and recording criminal evidence and personal property.
- General law enforcement practices and procedures regarding evidence and personal property storage, retention, and disposition.
- General law enforcement procedures, policies, and terminology
- Records management and maintenance techniques and practices.
- Business English composition, spelling, and punctuation.
- Standard computer applications and computer operation
- Basic office operations and equipment.

### **Skill & Ability**

- Familiarize and explain complex laws and statutes to clients of varying backgrounds and educational level.
- Communicate effectively, both orally and in writing.
- Organize and evaluate a variety of information and take appropriate action; ability to pay attention to detail.
- Learn modern methods of criminal investigation and evidence identification.
- Learn court procedures and rules of evidence in criminal law.
- Operate, extract, and input data from and into computer systems with a high level of keyboarding accuracy. Demonstrate high levels of proficiency with Law Enforcement and Criminal Justice computer programs.
- Plan, train, and lead designated employees in the completion of various projects, including monitoring, approving and informally assessing performance.
- Operate a variety of general office equipment.
- Exercise independent judgment and self-initiative.

### **Licenses, Certifications & Other Requirements**

- Required at time of appointment: possession of Law Enforcement Data System (LEDS) certification and Criminal Justice Information Services (CJIS) clearance or must obtain both within 90 days. Must be maintained during employment.
- Required within six months of hire: NIMS IS 100 and 700 certifications.
- Possess or be able to obtain International Association of Property and Evidence (IAPE) property & evidence certification within 3 years of performing the functions of the position.
- Bi-lingual skills desirable.



# SERGEANT

## Job Description

*The job description does not constitute an employment agreement between the City and employee and is subject to change. The specific statements shown in each section of this description are not intended to be all-inclusive. They represent typical elements and criteria considered necessary to successfully perform the job.*

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<b>Class Title:</b>	Sergeant	<b>Effective Date:</b>	August 1, 2020
<b>Working Title:</b>	Sergeant	<b>Type:</b>	Supervisory
<b>Department:</b>	Police	<b>Supervisor:</b>	Lieutenant
<b>FLSA Status:</b>	Non-Exempt	<b>Supervises:</b>	Police Officers, Volunteers, Non-Sworn employees

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### CLASSIFICATION SUMMARY

The Sergeant plans and manages administrative and tactical operations and activities of an assigned unit or patrol shift and/or programs to include leadership, supervision, direction, training and management. The position provides overall command of assigned unit personnel and activities as it pertains to overall operations. This position directs briefing and planning activities prior to the start of a shift or specific police mission and ensures adequate staffing is present 24-hours per day. This position provides leadership, which includes motivation of department personnel, anticipation and response to organizational and community needs and positive direction in conflict resolution. This position works with and at the direction of superiors to manage subordinate functions of the police department, ensuring activities are consistent with community and industry standards and expectations and in keeping with the mission of the Police Department. Personal conduct and behavior (on-duty and off-duty) must be such that it builds public confidence in the agency and its members.

### SUPERVISION

This is a supervisory position. This position supervises assigned employees, which includes: scheduling and assigning work; mentoring, coaching, and training; developing work plans and reviewing work for completion; evaluating performance and providing necessary feedback to employees; setting work standards; imposing or effectively recommending necessary disciplinary action; responding to grievances; and making or effectively recommending hiring and termination decisions.

### PHYSICAL & MENTAL DEMANDS – SAFETY – WORKING CONDITIONS

*The work environment/physical demands described are representative of those an employee may encounter while performing the essential functions of this position. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

#### Physical & Mental Demands

Mental alertness is important because of the need to make fine discriminations and decisions concerning subtle cues of impending danger or to discover inconsistencies in witnesses or situations changing dramatically within a few seconds, taxing the maximum of human endurance. Therefore, incumbents must remain physically and mentally fit to enable them to handle recurrent contacts and involvement with dangerous and potentially dangerous people, animals and equipment, using only that amount of force that reasonably appears necessary, given the facts and circumstances perceived by the officer at the time of the event, to effectively bring an incident under control.

#### Safety

Employees must maintain a safe work environment by complying with City and Department safety policies and rules and by practicing safety while performing the essential functions of the position. This supervisory position is responsible to actively support safety and loss control measures for the City as a whole and to maintain accountability for safety and loss control issues within the department.

## **Working Conditions**

Work conditions may vary by shift. Some tasks are performed in an office setting with a noise level that is usually moderately quiet and some tasks are performed outside from a police vehicle. Few tasks require heavy lifting, pushing, pulling or carrying heavy loads. Physical strength, agility, and stamina sufficient to perform the duties, including work beyond normal requirements in emergencies are required. Flexibility is important because of the need to frequently enter and exit vehicles, inspect buildings, climb over and around obstacles, make sudden moves, etc. Duties include risk of exposure to bloodborne pathogens and disease.

## **ESSENTIAL FUNCTIONS – DUTIES & RESPONSIBILITIES**

*An employee in this classification may perform any of the following duties; however, these examples do not include all the specific tasks which an employee may be expected to perform. Duties and responsibilities are subject to change by the employer as the needs of the employer and requirements of the job change.*

It is the responsibility of every employee to represent the City of Keizer by responding to the public, citizens, its employees, and others promptly, professionally and with courtesy. This includes regarding everyone, internal and external, as a customer and delivering the best service possible in a respectful and patient manner. Additional responsibilities include assisting other staff in the performance of their duties as assigned, maintaining regular job attendance and adherence to assigned working hours, and operating a motor vehicle safely and legally while on City business.

### **100% Job Duties**

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Performs a variety of routine and complex public safety work in the administration of the Police Department. Supervises police personnel under various conditions.

Monitors police department activity and equipment operations to ensure proper safety practices; implements and maintains safe operating practices; assures compliance with proper safety procedures, rules, and regulations.

Oversees and may personally participate in investigating criminal law violations occurring within the jurisdiction of the Department, obtaining evidence and compiling information regarding these crimes, preparing cases for filing of charges, testifying in court, and related activities.

Must be able to provide credible sworn testimony.

Supervises the scheduling and coordination of shifts, ensuring proper and appropriate deployment. Plans, organizes and supervises various activities of the police department developing staffing plans to meet daily requirements. Develops and maintains the shift schedule including overtime.

Provides progressive and responsive leadership to assigned unit(s) of the Police Department.

Makes day-to-day assignments as required by the needs of the department.

Reviews department policies and makes recommendations for changes to ensure efficiency of operation and compliance with local, state and federal law.

Makes plans about individual tactical matters such as equipment to be used for particular operations or the detailed plans needed for an investigation. Develops new approaches to investigate problems.

Determines how to deploy personnel during emergency responses.

Maintains contact with Lieutenant to coordinate investigation activities, provides mutual assistance during emergency situations, and provides general information about department activities.

Maintains normal availability by radio or telephone for consultation on significant incidents.

Oversees and assists, as needed, in the patrol of city streets, parks, and commercial and residential areas, school zones and high activity areas. Conducts building security checks, checks for suspicious persons and vehicles. Preserves the peace, enforces the law, controls vehicular traffic, prevents or detects and investigates misconduct involving misdemeanors, felonies, and other law violations. Issues citations or warnings to violators.

Prepares a variety of reports and records.

Serves as the department representative at a variety of meetings, committees, conferences, and community organizations.

Assigns duties to personnel, reviews and evaluates performance, provides training and input, ensures accountability and productivity, and handles grievances as applicable or otherwise directed by superiors. In addition to Police Officers, supervises personnel such as traffic volunteers, Reserve Police Officers, Cadets, etc.

Provides recommendations to the Chief of Police regarding the selection of candidates for employment, promotions, and transfers based on independent evaluation of the relative skills and ability of such candidates.

Participates in determining facts of administrative/internal investigations involving possible policy violation complaints, accidents, etc. and ensures compliance with laws and departmental policies. Issues discipline and/or makes recommendations to Lieutenants and Chief of Police for disciplinary action arising from such investigations, as set forth below. Conducts internal affairs investigations regarding possible officer misconduct.

Exercises independent judgment to issue and effectively recommend disciplinary action, consistent with established policies and procedures, as necessary to maintain departmental standards of performance and conduct. Responsibility to impose disciplinary action includes the independent authority to counsel and issue verbal and written reprimands. Other disciplinary responsibility includes providing recommendations to the Chief of Police regarding the suspension, demotion or discharge of personnel.

Reviews and provides assistance and/or advice and guidance to subordinate personnel on serious or sensitive issues and makes recommendations to Lieutenants and Chief of Police.

Participates in the development and implementation of goals, objectives, regulations, policies and priorities for assigned area of responsibility including field operations, patrol, criminal investigations, etc.

Assists in the selection and training of police, civilian, and volunteer personnel. Responsible for exercising independent judgment to motivate and evaluate assigned personnel; provides or coordinates staff training; works with employees to identify, address and hold personnel accountable for correcting deficiencies.

Participates in planning, organizing, leading, and evaluating the work plan for the Police Department as a whole and especially the particular area of assignment.

Identifies opportunities for improving service delivery methods and procedures; reviews with appropriate management staff; implements improvements.

Participates in the development and administration of the Police Department budget for various programs including but not limited to the Canine Program, Reserve Program, Cadet Program, and Defensive Tactics Program. Forecasts funds needed for staffing, equipment, materials and supplies; writes and manages grants; monitors and approves expenditures; recommends adjustments as necessary. Coordinates assigned activities with those of other divisions, outside agencies and organizations; provides staff assistance to; prepares and presents staff reports and other necessary correspondence.

Provides technical assistance and decision making to all areas affecting department operations; supervises major crime and accident scenes.

Responds to resolve difficult and sensitive citizen inquiries and complaints; confers with citizens and business owners; provides information on law enforcement activities.

Coordinates training to meet the needs and requirements of the department personnel.

Establishes and maintains cooperative working relationships in the City and in other jurisdictions. Confers with attorneys in connection with the prosecution of criminal complaints. Participates in public relations programs of the department and maintains communications with organizations, schools, and other groups in the City.

Interprets new laws, ordinances, rules, regulations, policies, and procedures for employees.

Reviews documentation by subordinate personnel for accuracy and completeness. Conducts formal shift briefings. Conducts personnel and patrol vehicle inspections. Provides coaching, counseling and in-service training for personnel.

Develops and directs the outcome of long-term crime reducing strategies; develops and oversees programs such as Neighborhood Watch.

Manages traffic safety and criminal response unit officers.

Manages school resource officers and directs efforts aimed at preventing crimes in schools and threats to students and faculty. Develops, implements, and supervises concurrent school safety programs.

Develops, maintains records for and provides overall direction and supervision of programs such as K9, Emergency Vehicle Operation, Field Training and Evaluation Program, Administrative Inquiries, and Officer Survival Skills.

## **MINIMUM QUALIFICATIONS**

### **Education & Experience**

High school graduate or GED equivalency; Associate degree or ability to obtain one within two years of appointment and three (3) years of experience as a police officer; or any equivalent combination of education and experience which provides the knowledge, skills and abilities to perform the essential functions and responsibilities of the position.

### **Skill & Ability**

- Verbal and written fluency in the English language.
- Must be able to provide credible sworn testimony.

### **Licenses, Certifications & Other Requirements**

- United States citizen.
- 21 years of age at time of appointment.
- Free of criminal convictions defined by Oregon Administrative Rule.
- Be of good moral character.
- Pass the Pre-Background Screening (Integrity Interview).
- Pass a comprehensive background investigation.
- Pass medical and psychological evaluations.
- Valid driver license at time of hire and maintained during employment.
- Required at time of appointment: possession of Law Enforcement Data System (LEDS) certification and Criminal Justice Information Services (CJIS) clearance or must obtain both within 90 days. Must be maintained during employment.

## **ADDITIONAL QUALIFICATIONS**

### **Knowledge**

- Practices, principles, and procedures of police administration, criminal investigation.
- Modern methods and techniques used in the prevention, investigation, and suppression of criminal activities.
- Departmental regulations, procedures, ordinances, and the laws controlling and defining work methods and solutions.
- Safety regulations, procedures, and practices in law enforcement.
- City, state, and federal laws and regulations pertaining to police service.
- Supervisory principles, practices, and methods.

### **Skill & Ability**

- Plan, organize and oversee assigned work programs including monitoring work schedules and evaluating the work of subordinates.
- Analyze and evaluate operations and develop and implement corrective action to resolve problems.
- Establish and maintain effective working relationships with managers, supervisors, and employees.
- Communicate effectively, both orally and in writing, regarding complex or sensitive issues.
- Operate assigned firearms and equipment skillfully, safely, and in conformance with applicable laws and regulations.
- Perform effectively in emergency and stressful situations.

### **Licenses, Certifications & Other Requirements**

- Intermediate Certificate, Advanced Certificate, and/or Supervisory Certificate issued by the Oregon Department of Public Safety Standards and Training (DPSST) are to be obtained as soon as practicable.
- Required within six months of promotion or hire: NIMS ICS 100, 200, and 700 Certifications.
- Generally, the department has no overall residency requirement; however, certain special duty assignments require a minimum response time, and all members are required to be able to tend to their duties responsibly and within a reasonable amount of time.

**CRIMINAL INVESTIGATIONS DIVISION**  
**Safety and Support Response Team Officer**  
**SSRT Detective Assignment**

**MINIMUM QUALIFICATIONS**

- Applicants must have two years of full-time experience
- Be off probation (exceptions may be made for lateral transfer officer)
- Have education, training, and demonstrated abilities in related areas (such as investigative techniques, report writing, good interpersonal skills, teamwork, etc.)
- Ability to write comprehensive, accurate reports with minimal errors
- Demonstrate ability and desire to conduct follow-up and thorough investigations
- Experience working with the Salem-Keizer School District as a School Resource Officer
- Knowledge and demonstrated understanding of student threat assessment
- Minimum commitment of two years to the assignment

**DESIRED QUALITIES AND ABILITIES**

- Ability to handle multiple cases at once, with the ability to prioritize responsibilities within the caseload
- Ability to maintain good working relationships with co-workers, prosecutors, DHS, Liberty House, Salem-Keizer School District (SKSD) employees, and others
- Basic understanding of logic as related to investigations and interviews
- Teachable attitude and desire to learn
- Understanding that the needs of the case will dictate work hours
- Above-average commitment to quality work and professional standards
- Team player, hardworking, thorough, good interpersonal skills

**JOB DUTIES**

The Safety and Support Response Team (SSRT) is comprised of five individual sections:

1. Student Threat Assessment Team;
2. Marion County Adult Threat Advisory Team;
3. Sexual Incident Response Committee;
4. Suicide Risk Assessment Team;
5. Active participation within the Juvenile Fire Setter Intervention Network

The SSRT is comprised of community professionals dedicated to public and staff safety, as well as the educational success and safety of students who have engaged in, or are preparing to engage in, behaviors that could result in significant harm, injury, or death.

The SSRT is focused on providing preventive, inclusive, and culturally sensitive solutions to these behaviors. In all cases, it is the goal of the SSRT to be a deterrent to discipline with the focus on wrap-around services to aid the student in their educational success and success in their future as an adult.

SSRT law enforcement members are not School Resource Officers and are not charged with the duties or responsibilities of a School Resource Officer. Barring an emergency, or mandatory response set forth in policy or ethical obligations, the duties of an SSRT member include but are not limited to:

- Attend Mid-Valley Student Threat Assessment Team meetings (STAT)
- Attend Mid-Valley Sexual Incident Response Committee meetings(SIRC)
- Attend meetings of the Marion County Juvenile Fire Setter InterventionNetwork
- Act as a liaison in gathering and sharing information or records related to criminal investigations or incidents, involving SKPS, student, staff, or adults from all criminal justice resources as it pertains to the function of STAT, SIRC, Fire, and SRA Records. "Records" do not include those that cannot be released pursuant to Oregon Revised Statutes 192.559(9)(a), 419A.255, and 419A.257.
- Participate as the law enforcement representative in all level 1 STAT, SIRC, and Fire assessments
- Participate as the law enforcement representative in all level 2 STATand SIRC assessments
- Provide consultation to the Suicide Risk Assessment (SRA) Team
- Assist SRA with any immediate danger to self or others safety holds, asdetermined by the SSRT officer
- Provide consultation to the SRA for safety and welfare checks during school to help determine the appropriate response.
- Act as a liaison to the Mobile Crisis Response Team (MCRT)
- Attend as a SKPS representative to the Marion County Threat AdvisoryTeam
- Provide in-depth guidance of criminal justice systems to aid in STAT, SIRC, Fire setter, and SRA assessments
- Act as a consultant to school teams related to the Safety and Support Response Team

- Provide guidance to families on how to navigate the criminal justice system, including providing support and/or resources to students who have been victimized, or to families who believe their child(ren) may be at risk of harm
- Review police reports to intervene proactively with mental health support, school response teams, and implementation of prevention strategies
- Assist in any immediate safety and security response to any circumstance where it is believed violence is imminent or there is a risk of serious physical injury or death during the school week
- Attend training related to the SSRT systems, school safety systems, early intervention, trauma-informed practices, restorative justice, equity, and bias
- Act as a liaison to local law enforcement agencies to build knowledge regarding prevention, school safety systems, early intervention, trauma-informed practices, restorative justice, equity, and bias
- Assist SSRT in Level 1 and Level 2 annual training (developed and delivered as needed by the city and school district)

### **WORKING CONDITIONS**

- The Detective Lieutenant and Detective Sergeant will supervise the SSRT assignment. The sergeant will manage and supervise day-to-day operations
- The SSRT assignment will be stationed in the office formerly staffed by the SRO sergeant
- The SSRT assignment will require commuting to meetings throughout the day at various SKSD locations
- The member in the SSRT assignment will wear casual business attire and will receive a detective clothing stipend
- Assigned an unmarked police vehicle to take home for after hour responses
- The work schedule will be five consecutive eight hour days, Mon-Fri
- Work hours are 7:00 a.m. – 3:00 p.m. with a 30 minute paid lunch, unless involved in a major case requiring modified hours
- Occasional and unplanned overtime



# SUPPORT SERVICES SUPERVISOR

## Job Description

*The job description does not constitute an employment agreement between the City and employee and is subject to change. The specific statements shown in each section of this description are not intended to be all-inclusive. They represent typical elements and criteria considered necessary to successfully perform the job.*

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<b>Class Title:</b>	Support Services Supervisor	<b>Effective Date:</b>	September 1, 2019
<b>Working Title:</b>	Support Services Supervisor	<b>Type:</b>	Management/Supervisory
<b>Department:</b>	Police	<b>Supervisor:</b>	Support Lieutenant
<b>FLSA Status:</b>	Non-Exempt	<b>Supervises:</b>	Police Support Specialists, Property & Evidence Specialist, Citizen Volunteers, and Temporary Support Services Staff

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### CLASSIFICATION SUMMARY

This supervisory position is responsible for the day to day operation of the Police Support Unit and Property and Evidence. This position Supervises Police Support Specialists, the Property & Evidence Specialist and citizen volunteers assigned to the unit. This classification has substantial authority and autonomy, thus the employee is expected to recognize and perform other duties not specifically listed in this job description when deemed appropriate and to advise the Support Lieutenant when such action is necessary. Works with and at the direction of the Support Lieutenant to ensure activities are consistent with community and industry standards and expectations and in keeping with the mission of the Police Department. Personal conduct and behavior (on-duty and off-duty) must be such that it builds public confidence in the agency and its members.

### SUPERVISION

This is a supervisory position. This position supervises assigned employees, which includes: scheduling and assigning work; mentoring, coaching, and training; developing work plans and reviewing work for completion; evaluating performance and providing necessary feedback to employee; setting work standards; imposing or effectively recommending necessary disciplinary action; responding to grievances; and making or effectively recommending hiring and termination decisions.

### PHYSICAL DEMANDS – SAFETY – WORKING CONDITIONS

*The physical demands (including lifting, mobility, movement and manual dexterity), work environment and working conditions described below are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

#### Physical Demands

In the performance of job duties, the employee is frequently required to sit; talk or hear; walk; use hands to finger, handle, or feel objects, tools, or controls; bend; and reach with hands and arms. The employee must lift and/or move up to 30 pounds and infrequently lift and/or move up to 50 pounds. Specific vision abilities required by this job include close, distance, color and peripheral vision; depth perception; and the ability to adjust focus. Manual dexterity and coordination are required to perform the work. These abilities are necessary to use a computer and various software programs, calculator, phone, copy and fax machines, and other related tools and equipment.

#### Safety

Employees must maintain a safe work environment by complying with City and department safety policies and rules and by practicing safety while performing the essential functions of the position. This supervisory position is responsible to actively support safety and loss control measures for the City as a whole and to maintain accountability for safety and loss control issues within the department.

## **Working Conditions**

In the performance of the job duties, the employee will perform the majority of this job in an office environment under usual office working conditions. The noise level in the work area is typical of most office environments, with telephones, frequent interruptions, and background noises. May occasionally work in outside weather conditions where the noise level in the work environment may be moderately noisy. Duties include contact with employees, other government agencies, and members of the public in conflict situations and risk of exposure to bloodborne pathogens and disease.

## **ESSENTIAL FUNCTIONS – DUTIES & RESPONSIBILITIES**

*An employee in this classification may perform any of the following duties; however, these examples do not include all the specific tasks which an employee may be expected to perform. Duties and responsibilities are subject to change by the employer as the needs of the employer and requirements of the job change. Furthermore, this classification has substantial authority and autonomy, thus the employee is expected to recognize other needs, to perform them when appropriate, and to advise the Support Lieutenant when those needs exceed the scope of this job description.*

It is the responsibility of every employee to represent the City of Keizer by responding to its employees, other members of the criminal justice system, and the public promptly, professionally and with courtesy. This includes regarding everyone, including other City employees, as a customer, delivering the best service practicable, in a respectful and patient manner. Additional responsibilities include assisting other staff in the performance of their duties as assigned, maintaining regular job attendance and adherence to working hours, and operating a motor vehicle safely and legally while on City business.

### **50% Police Support Services Supervisory Duties**

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Maintains staffing levels and ensures that all functions of the unit are carried out accurately, timely and in accordance with City and department policies and state and federal laws.

Assigns duties as necessary to meet departmental goals and deadlines, working in conjunction with patrol and administrative managers.

Conducts scheduled performance evaluations.

Motivates and assists employees in attaining their career goals and meeting minimum standard performance levels which may include taking corrective action and discipline measures per City and department policies.

Trains new employees and volunteers.

Actively participates as a member of the Management team, communicating department goals and objectives to employees; Acts as liaison for Support Services Unit with other department units and staff members.

Actively problem solves to attain maximum efficiency and productivity.

Responsible for security, integrity, and retention of Police Incident Case files to include digital imaging, storage, archiving, and purging of such in accordance with State Archives Rules.

Performs criminal history checks of applicants as authorized by City Ordinance.

Acts as department representative participating in interagency meetings and contributes to the improvement and enhancement of shared police record management applications and databases.

Reviews citizen and governmental agency requests for copies of police reports and/or police contacts pertaining to specified names or other data. Approves or denies these requests based upon applicable Oregon Public Record Law and departmental policies.

Backup for Police Support and Property and Evidence specialists as needed.

Directs citizen volunteers and temporary staff assigned to Support Services.

Conducts research of police records, analyzes and compiles data and provides statistical reports as requested.

Processes court-ordered sealing and expungement of records.

Acts as agency representative for the National Incident Based Reporting System.

### **30% Property and Evidence Supervisory Duties**

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Oversees and directs, when necessary, the activities of the Property and Evidence Specialist ensuring all phases of property and evidence functions are carried out accurately, timely and in accordance with City and department policies, state and federal laws, including but not limited to:

Monitors the flow of property, making recommendations and directing the disposal of excess property in custody to maintain a manageable level of property storage.

Performs periodic audits of property control to ensure compliance with department policies as well as state and Federal laws.

Researches and oversees the procurement and maintenance of supplies and equipment pertaining to handling, packaging, storing and disposal of property.

Back up for Property and Evidence Specialist as needed.

Supervises Property and Evidence Specialist and citizen volunteers assigned to assist with Property and Evidence.

### **20% LEDS/CJIS Representative**

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Responsible for ensuring that the department adheres to Law Enforcement Data Systems (LEDS) of the State of Oregon policies and Oregon Administrative Rules pertaining to the use and dissemination of criminal justice information.

Trains all agency personnel accessing criminal justice information via LEDS, including issuing, correcting and recording training and re-certification tests. Administers and records Criminal Justice Information Services (CJIS) Awareness Training to various City contractors.

Performs required monthly Validation Process of the agency's LEDS / National Crime Information Center (NCIC) record entries.

Communicates revisions and updates to agency users. Regularly attends Regional and State Data Systems meetings and training classes to keep current with such updates and any other appropriate training as necessary.

## **MINIMUM QUALIFICATIONS**

### **Education & Experience**

High School graduate or GED equivalency. Minimum of four years of law enforcement background, having performed all functions of Police Support Specialist or comparable amount of college course work in a management or law enforcement program at an accredited college, plus one year experience in a public safety agency and two years of supervisory experience, or any equivalent combination of education and experience which provides the knowledge, skills and abilities to perform the essential functions and responsibilities of the position.

### **Skill & Ability**

- Verbal and written fluency in English language.

### **Licenses, Certifications & Other Requirements**

- Pass a comprehensive background investigation.
- Required at time of appointment: possession of Law Enforcement Data System (LEDS) certification and Criminal Justice Information Services (CJIS) clearance or must obtain both within 90 days. Must be maintained during employment.

## **ADDITIONAL QUALIFICATIONS**

### **Knowledge**

- LEDS/NCIC policies and regional system operations.
- Modern office operations and equipment, including accurate keyboarding with proven computer skills in data entry, word processing, database and spreadsheet applications.
- Property and evidence functions including applicable laws and standards.
- Law enforcement filing system.
- Oregon Public Record Law and retention schedules.

### **Skill & Ability**

- Effectively communicate orally and in writing with public and interdepartmental contacts.
- Prioritize tasks and meet deadlines.
- Recognize and anticipate departmental needs.
- Work independently, prioritize, and delegate tasks.
- Lead and motivate staff.

### **Licenses, Certifications & Other Requirements**

- Required within six months of promotion or hire: NIMS ICS 100, 200, and 700 Certifications.

CRIMINAL INVESTIGATION DIVISION  
Youth Safety and Support Officer (YSSO)  
Juvenile Detective Assignment

MINIMUM QUALIFICATIONS

- Applicants must have two years of full-time experience
- Be off probation (exceptions may be made for lateral transfer officer)
- Have education, training, and demonstrated abilities in related areas (such as investigative techniques, report writing, good interpersonal skills, teamwork, etc.)
- Ability to write comprehensive, accurate reports with minimal errors
- Demonstrate ability and desire to conduct follow-up and thorough investigations
- Minimum commitment of two years to the assignment

DESIRED QUALITIES AND ABILITIES

- Ability to handle multiple cases at once, with the ability to prioritize responsibilities within the caseload
- Ability to maintain good working relationships with co-workers, prosecutors, DHS, Liberty House, Salem-Keizer School District (SKSD) employees, and others
- Basic understanding of logic as related to investigations and interviews
- Teachable attitude and desire to learn
- Understanding the needs of a case will dictate work hours
- Above-average commitment to quality work and professional standards
- Team player, hardworking, thorough, good interpersonal skills

JOB DUTIES

The duties of a YSSO include but are not limited to:

- Provide community-based policing support to the Salem/Keizer School District through its Director of Safety and Risk Management Services (SMRS)
- Investigate major crimes involving juvenile victims and offenders at school campuses
- Investigate DHS 307s (cross reports) involving juvenile victims attending school in Keizer, as assigned
- Staff cases with the Marion County Child Abuse Multi-Disciplinary Team (MDT)
- Attend child abuse forensic interviews at Liberty House (LH)
- Coordinate investigations with DHS Child Welfare and the SKSD
- Participate in case-assigned school Threat Assessment meetings along with the

#### SSRT member

- Serve as liaison to the school district's Emergency Operations Center (EOC)
- Provide critical information and communications that affect the school environment
- Assist the director of SRMS in developing plans and strategies to prevent or mitigate dangerous situations that may occur on any district owned property
- Process crime scenes, including photography of the location and the development, collection, and preservation of evidence
- Locate and solicit information from suspects and witnesses for the investigation and court proceedings
- Conduct in-depth interviews, take detailed statements, and prepare detailed reports
- Appear in court as a professional witness, having prepared case facts before proceedings with all involved parties (DA, SKSD, LH, MDT, DHS, etc.)
- Prepare and serve subpoenas, search warrants, and supporting affidavits
- Assist other detectives with major crime callouts outside of regular hours
- Respond after hours to major incidents involving the SKSD
- Attend training to obtain and maintain skills necessary to the position
- Ability to speak clearly and concisely and to give accurate testimony
- Other duties as assigned

#### WORKING CONDITIONS

- The Detective Lieutenant and Detective Sergeant will supervise the YSSO. The sergeant will manage and supervise day-to-day operations
- The YSSO will be assigned a workstation inside the Criminal Investigations Division
- The YSSO will wear casual business attire and will receive a detective clothing stipend
- Assigned an unmarked police vehicle to take home for after hour responses
- The work schedule is four 10-hour shifts during the regular workweek (Mon-Thurs), with a modified floating holiday accrual
- Work hours are 7:00 a.m. – 5:00 p.m. with a 30-minute paid lunch, unless involved in a major case requiring modified hours
- Occasional and unplanned overtime