

# Letting the Sunlight In

Oregon Quasi-Public Agencies and the  
Need for Budget Transparency

**OSPIRG**  
Foundation



# Letting the Sunlight In Oregon Quasi-Public Agencies and the Need for Budget Transparency

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## ■ Executive Summary

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At least 30 quasi-public agencies in Oregon perform public functions, overseeing billions of dollars in their budgets. However, they operate with far less transparency and public accountability than other state agencies.

*A quasi-governmental organization, corporation or agency* is a publicly chartered body that provides a public service and is controlled by an appointed board. In Oregon they provide essential public services, such as transportation, accident insurance, housing, economic development and health care. They employ thousands of Oregonians and oversee multi-billion-dollar budgets.

But they are not strictly public agencies, because they do not principally rely on funding from the state budget, and they operate independently from normal state oversight. Nor can they be classified as private because they are overseen by government-appointed boards and are granted public powers to collect fees or other revenues, as well as to provide public services.

Despite significant strides toward government transparency in other areas of Oregon's budget, quasi-public agencies remain largely exempt from public oversight. This reduces the taxpayers' ability to hold these agencies accountable for their performance and use of public funds.

### **Oregon's quasi-public agencies play a large and important role in government operations.**

- There are at least 30 quasi-public agencies in Oregon, collectively employing *at least* 18,385 Oregonians and overseeing billions of dollars in revenues and spending.
- Much of the public's contact with government occurs through public structures provided by quasi-public agencies, such as transportation, insurance and healthcare.
- The combined expenses of the 14 quasi-public agencies for which budgetary information could be obtained totaled just under \$4 billion annually. This is more than four times as much as Oregon allocates for the Department of Education and almost twice as much as the state spends through the Department of Transportation.<sup>1</sup> Some of these agencies, for example the Oregon Health Sciences University, oversee as much as \$1.3 billion<sup>2</sup> in annual outlays, or almost one-third more than the Oregon Housing and Community Services agency.<sup>3</sup>
- By comparison, the entire state budget was about \$29.8 billion<sup>4</sup> per year in the 2009-11 biennium; the 14 quasi-public agencies for which data could be obtained account for an additional 13.3 percent in public spending that goes without normal government oversight or public scrutiny.

**Only a few quasi-public agencies disclose detailed financial information online, while many provide limited or no information.**

- Only 14 of the 30 quasi-public agencies identified in this report disclosed *any* financial information online. Of these only 9 have reasonably detailed budgetary reports available.
- Not a single quasi-public agency provides checkbook-level information, which would enable citizens to track individual public expenditures.
- None of the quasi-public agencies make financial information available on the Oregon transparency website.

**Requiring quasi-public agencies to publish detailed financial information on the state transparency website is an easy and cost-effective way for Oregon to benefit from increased transparency.**

- Financial transparency promotes fiscal responsibility, efficient use of resources and public confidence.
- Providing financial information online is a cheap, cost-effective way to keep government transparent and accountable.
- Important steps have been taken toward increased transparency in Oregon—such as the creation of the state transparency website—but there is still a lot of room for improvement.
- It is especially important that quasi-public agencies be transparent because they are generally subject to far less financial oversight than other public agencies, and not subject to the accountability that elections provide.

# ■ Introduction

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Transparency is essential for the public to understand government activities and priorities. For the public to hold government officials accountable, we need to have access to clear, comprehensive information about government expenditures.

The ability to follow government expenditures and understand what they are supposed to accomplish is the first step in determining if the decisions of our public officials best serve public goals.

There are several key benefits to online transparency of government budgets:

- *Increased civic engagement* – Americans are eager to use transparency websites. A 2008 survey found 71 percent of respondents who receive budget information or believe it is important to receive budget information would use that information to influence their voting decisions, 48 percent would respond by contacting their representatives, and 28 percent would attend a town hall meeting or other political gathering.<sup>5</sup>
- *Big savings* – Transparency websites can save millions through more efficient government operations, fewer manual information requests, more competitive contracting bids, and lower risk of fraud. In the two years following the launch of its transparency website, the Texas Comptroller reported \$4.8 million in savings from more efficient government administra-

tion.<sup>6</sup> Utah estimates millions in savings from reduced information requests.<sup>7</sup> The largest savings may come from prevention of waste or abuse of public funds due to enhanced public scrutiny—savings that are impossible to quantify but likely significant.

- *Better-targeted expenditures* – Transparency budget portals allow states to track how well subsidies and tax incentives deliver results. Funds from underperforming projects and programs can be reinvested in more successful programs. For example, Illinois has been able to recapture money from numerous projects that failed to deliver promised results.<sup>8</sup>
- *Better coordination of government contracts* – The Massachusetts State Purchasing Agent identifies four sources of savings for state procurement officers: sharing information with other public purchasers on good deals; avoiding wasteful duplication of bidding and contracting procedures through centralized processes; better enforcement of favorable pricing and contract terms; and focusing cost-cutting in areas where greater resources are spent.<sup>9</sup>

The 2009 Oregon legislature passed a new law to improve transparency. HB 2500 requires the state to create a website that will be a one-stop shop for citizens to find out how the state is spending tax dollars, and it creates a “Transparency Oregon Advi-

## Identified Quasi-Public Agencies in Oregon<sup>10</sup>

- Oregon Health Sciences University (OHSU)
- Port of Portland
- TriMet
- SAIF Corporation
- Portland Development Commission
- Housing Authority of Portland
- Lane Transit District
- Yamhill County Housing Authority
- Douglas County Housing Authority
- Lane Regional Air Protection Agency
- Linn-Benton Housing Authority
- Oregon State Bar Association
- Mid-Columbia Housing Authority
- Columbia Gorge Housing Authority
- Housing Authority of Umatilla County
- Clatsop County Housing Authority
- Fair Plan Association
- Greater Oregon Behavioral Healthcare, Inc.
- Prineville Airport Commission
- Coos-Curry County Housing Authority
- Housing Works (Central Oregon)
- Housing Authority of Jackson County
- Josephine Housing and Community Development Council
- Klamath Housing Authority
- Housing and Community Services Agency of Lane County
- Housing Authority of Lincoln County
- Housing Authority of Malheur County
- Northeast Oregon Housing Authority
- Northwest Oregon Housing Authority
- West Valley Housing Authority

sory Commission” that will advise the state on how to make this website more useful to the public. This new website was launched at the end of December 2009, and provides information about the state budget at a checkbook level.

By “checkbook level” we mean that all actual expenses are listed, not merely the amount that has been budgeted for a certain category of expenses. This level of detail is important because it allows for the public to follow where their tax dollars go in reality.

While the Oregon Transparency website does provide significant detail of how the state spends money, it does not include any information about the spending by Oregon’s quasi-public agencies. Quasi-public agencies play important roles in government, providing such critical services as transportation, insurance, economic development, health care and housing. The creation of quasi-public agencies has served to fill these public needs with autonomous

agencies. Although most quasi-public agencies are created by legislation or executive order, they are not directly overseen by any branch of government. The boards that oversee quasi-public agencies are generally appointed by the governor or a recent governor, giving them relative autonomy and prohibiting the public accountability that elections allow. Quasi-public agencies are required to comply with public records laws, but do not have to publish detailed financial information online.

Making detailed financial data available online is an easy, cost-effective way to bring quasi-public agencies into the open and keep them publicly accountable for their actions. These websites can be created and maintained cheaply, often with existing staff and funding. This was the case with Missouri’s popular site,<sup>11</sup> as well as Oregon’s. The federal transparency website—which makes over \$2 trillion of annual spending information accessible to the public—cost less than \$1 million to create.<sup>12</sup>



## What is a Quasi-Public Agency?

A *quasi-public organization, corporation or agency* is a publicly chartered body that provides a public service and is controlled by a government-appointed board. They are not public agencies because they do not principally rely on state funding, and they operate independently of state oversight. Nor can they be classified as private because they are overseen by state-appointed boards and are given public powers to finance themselves and to provide public services.

This definition encompasses a wide range of organizational arrangements in Oregon. Although they are all established by statute and must abide by the rules set forth therein, those rules vary significantly. Some organizations, such as TriMet, have a relatively greater degree of autonomy than others, such as Oregon's housing authorities. For example, TriMet recently raised fees and cut service.<sup>13</sup> TriMet can also issue bonds for capital improvements and levy taxes to increase operating revenues. Oregon's housing authorities, in contrast, operate under strict regulations. Their ability to increase revenue is very limited. They can issue tax-exempt bonds, but only for project-specific purposes.<sup>14</sup> Quasi-public agencies can differ in many other ways as well, some functioning more like a business and others more like a state agency.

The quasi-public agencies in Oregon span a wide range of sizes. They include large entities such as the SAIF Corporation, TriMet and the Port of Portland—as well as small organizations such as the Clatsop County Housing Authority and the Oregon State Bar Association.

Governance of quasi-publics represents a double edged sword. On the one hand, the efficiencies that make them useful are derived from their independence, tax-exempt status and self-financing powers. Used effectively, these powers allow them to provide public services cheaply and efficiently. SAIF Corporation, Oregon's worker-compensation fund provider, competes in the market with other insurance companies. Their status as a quasi-public agency allows them to respond more rapidly to changing conditions in the market than if they were a govern-

ment agency. Oregon's worker-compensation rates, in part due to SAIF Corporation, are among the lowest in the nation.<sup>15</sup> Another quasi-public agency, the Oregon Health Sciences University (OHSU), is the only hospital in Oregon to be ranked in *U.S. News and World Report's* "Best Hospitals" for 16 straight years and ranks above the state and national averages in patient satisfaction<sup>16</sup> while maintaining costs around state averages.<sup>17</sup>

However, this independence can also lead to serious problems. Oregon quasi-public agencies have made controversial decisions that led to significant media attention. TriMet, for example, contracted with a rail-car company that it knew was failing—resulting in the expenditure of over \$5 million of public money in added costs.<sup>18</sup> Also, the Portland Development Commission was reported to have failed to deliver on promises to build affordable housing on South Waterfront, while allowing more than a thousand condos and apartments to be built—none of which qualify as affordable.<sup>19</sup> Their appointed boards are not elected and so are not directly accountable to voters. Quasi-public agencies are also exempt from the requirement that public agencies must post detailed financial information on the state transparency website. They are, however, bound by Oregon's public records and open meetings laws.

While there has been a general movement toward greater transparency in Oregon and nationwide, quasi-public agencies have remained exempt from the mandate to publicize detailed financial information online. Quasi-public agencies perform public functions, often use public funds and are publicly chartered; as such, they should be held to the same standards of transparency as public agencies. Given their autonomy and lack of oversight, it is especially important for quasi-public agencies to be transparent and accountable.

## A Nationwide Movement

The push for transparency is a bipartisan, nationwide movement. Governments at all levels have been taking the initiative to work toward increased transparency.

Some states have made efforts to include quasi-public agencies in the push for greater transparency

and accountability. Massachusetts, for example, created a Finance Advisory Board to oversee public debts—explicitly including those held by quasi-public agencies.<sup>20</sup> The Oregon State Treasury has a similar mechanism in their Debt Management Division, which does track debt of quasi-public agencies. However, the Massachusetts legislature has taken a further step for accountability and recently approved online spending disclosure reforms including the stipulation that quasi-public agencies provide financial data on the state transparency website. Massachusetts is among a growing list of states that include quasi-public agencies on their transparency websites including Kentucky, Texas, and Illinois.<sup>21</sup>

## **Oregon Quasi-Public Agencies Lack Transparency**

The Oregon state transparency website does not provide any financial information on any quasi-public agencies. Only a few of these agencies provide detailed financial information on their own websites, while many provide limited information or, in many cases, no budgetary information at all. This lack of transparency is especially problematic because of the volume of economic activity quasi-public agencies account for. Financial independence has meant that quasi-public agencies largely escape oversight and scrutiny, even though many of them receive direct public funding through grants, bonds and taxes. The absence of transparency allows for mismanagement, fiscal irresponsibility, patronage and scandal—all of which breed public mistrust and cynicism.

## Findings

### Quasi-public agencies play a large and important role in government operations

OSPIRG was able to identify 30 quasi-public agencies in researching this report, although there may be others. Some of the biggest quasias identified are the Oregon Health Sciences University (OHSU), TriMet, SAIF Corporation and the Port of Portland. The combined annual expenditures of the 7 largest quasias total \$3.9 billion. OHSU alone oversees \$1.3 billion in annual outlays. Quasi-public agencies also employ well over 18,385 Oregonians and provide essential services to millions.

It's easy to see that these agencies play a vital role in the daily lives of many Oregonians—whether that means getting them where they need to go, providing inexpensive insurance or even employing them. Between the financial resources they wield,

the public services they provide and the number of Oregonians they employ, quasi-public agencies have a significant, direct impact on the functioning of our state.

Much of the public's contact with the government occurs through these agencies. Thirty-seven percent of adults in the three-county area that TriMet covers use its public transit services at least twice a month—amounting to 99.3 million rides in the past year alone.<sup>22</sup> That's 26 times the population of Oregon or 26 rides per person. 2010 also saw 7,442,158 passengers pass through Portland International Airport,<sup>23</sup> which is operated by another quasi-public agency: the Port of Portland.

The Oregon Health Sciences University sees more than 600,000 outpatients annually, providing 34,614 jobs through the university and indirectly in the

**Table 1. Oregon's Seven Largest Quasi-Public Agencies (by annual revenue)**

Quasi-Public Agency	Employees	Revenues	Expenses
OHSU	13,200	\$1,450m	\$1,330m
Port of Portland	782.4	\$894.5m	\$894.5m
TriMet	2,600	\$866.7m	\$866.7m
SAIF Corporation	842	\$494m	\$442m
Portland Development Commission	200	\$166.3m	\$191m
Housing Authority of Portland	257	\$108m	\$109m
Lane Transit District	305	\$89.2m	\$89.2m

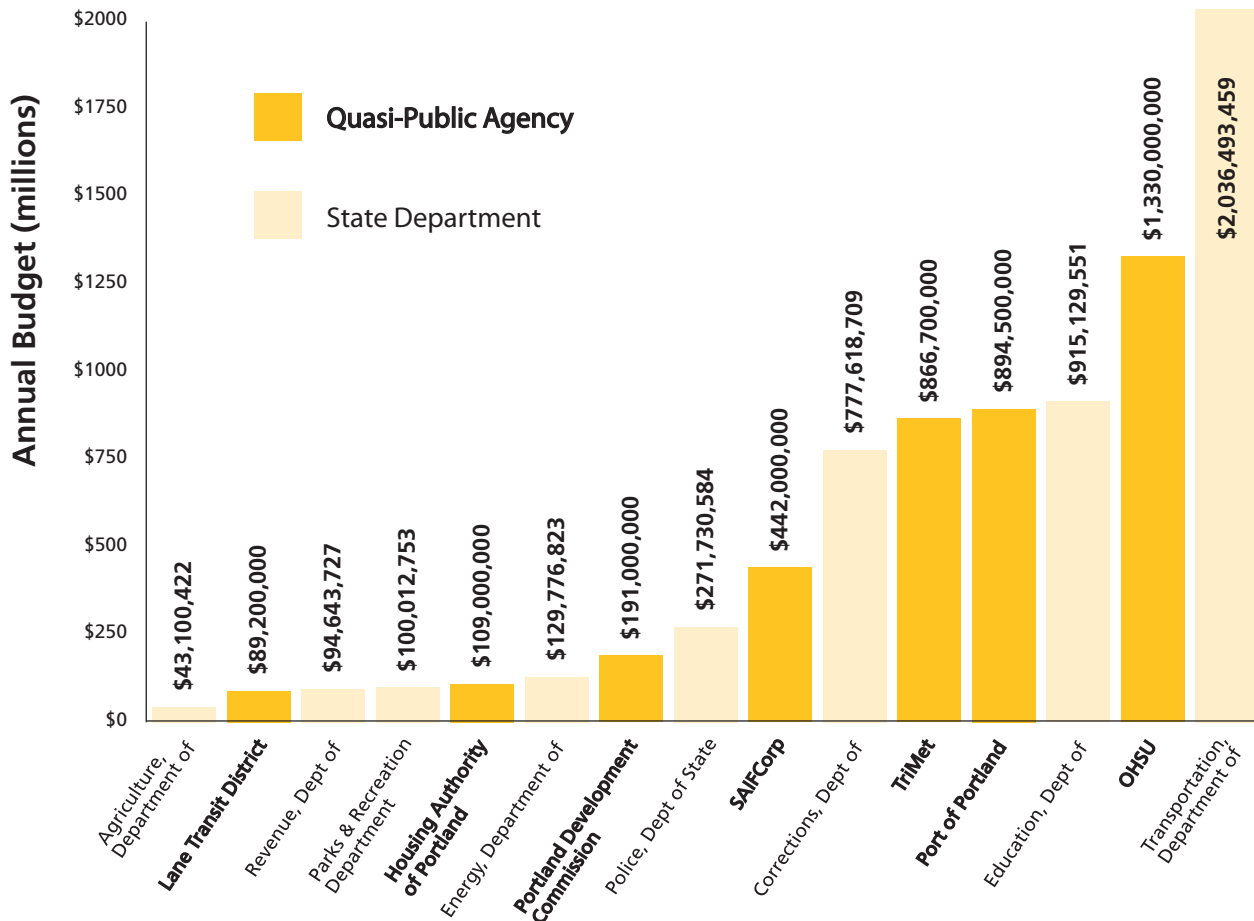
communities it serves.<sup>24</sup> OHSU is the single biggest employer in Oregon after the state and federal government. On a similar scope, The State Accident Insurance Fund provides insurance coverage for more than 600,000 workers in Oregon.<sup>25</sup>

**Only a few quasi-public agencies disclose detailed financial information online, while many provide limited or no information.**

Only 14 of the 30 quasi-public agencies identified in this report disclosed *any* financial information online, of which only 9 have reasonably detailed budgetary reports available. Not surprisingly, the smaller the quasi-public agency, the less likely it is to have financial information online. An exception to this rule is OHSU which is the largest quasi-public agency in Oregon, yet the information about their budget was difficult to find and lacked

details. Every state agency, regardless of size must report their budget information on the state transparency website. Housing authorities, which largely operate as pass-through entities for federal Housing and Urban Development funds account for the most of the quasi-public agencies without financial information, yet handle hundreds of millions public funds. The easiest to find financial information can be found at the websites of TriMet,<sup>26</sup> the Port of Portland,<sup>27</sup> Lane Transit District,<sup>28</sup> the Portland Development Commission,<sup>29</sup> the Housing Authority of Portland<sup>30</sup> and SAIF Corporation.<sup>31</sup> Each of these quasi-public agencies has a section of their website that is easily accessible and provides basic financial information about the agency including their annual budget. The Yamhill County Housing Authority<sup>32</sup> and the Douglas County Housing Authority<sup>33</sup> provided their most recent audits on their websites, which provides data on their spending, but not at

**Figure 1. Comparison of Size of State Departments and Quasi-Public Agencies**



a checkbook level. OHSU did not have a section of their website devoted to budget information, and financial information was only able to be gleaned by accessing numerous documents scattered across their site. Five other agencies<sup>34</sup> provided minimal information about their finances on their websites, mostly listed in their “about us” sections or in press releases. The remaining 16 agencies provided no financial information on their websites, or did not have a website. Two agencies, the Prineville Airport Commission and the Housing Authority of Malheur County do not currently have websites on which to post financial information.

None of Oregon’s quasi-public agencies provide checkbook-level information, which would enable citizens to track individual public expenditures. The website should include all individual expenditures, revenues, bond issuances, discretionary spending, subsidies, board member compensations, contracts, and grants given to private companies. The Oregon transparency website provides this level of detail for all direct spending by state agencies.

None of the quasi-public agencies make financial information available on the Oregon transparency website. Even though most quasi-public agencies were created by state law and perform public services, not a single one, even the largest, provides its budget information to the state transparency website. The state site is likely to be used by a member of the public wanting to know how their taxes are being spent. On this site, state agencies that raise their own revenues through usage fees, similar to how quasi-public agencies raise revenue, post all their sources of funding as well as all

their expenses. By not providing information about any quasi-public agency in Oregon, taxpayers will not be getting the whole story about the scope of government services provided in the state.

**Requiring quasi-public agencies to publish detailed financial information on the state transparency website is an easy and cost-effective way for Oregon to benefit from increased transparency**

Many states have reported significant savings as the result of better procurement practices,<sup>35</sup> more effectively targeted tax expenditures,<sup>36</sup> reduced public records requests<sup>37</sup> and other efficiencies<sup>38</sup>—all gained from online transparency.

Oregon has already created a state transparency website with existing staff and appropriations. Requiring quasi-public agencies to publish detailed financial information online—as all state agencies are required to do—would allow Oregonians to benefit from more comprehensive transparency. Increased transparency also means increased monitoring of programs, providing better information on performance and allowing more possibilities for intervention. This is crucial in holding quasi-public agencies accountable. Conflicts of interest, cost overruns and mismanagement are all vastly reduced when subjected to greater scrutiny. And better practices and performance encourage civic participation and bolster public confidence. By consolidating financial information in a single, user-friendly location, the Oregon transparency website presents a novel opportunity for improving both the performance and the accountability of public and quasi-public operations.

<b>Size and Transparency of Identified Quasi-Public Agencies in Oregon</b>	
Number of identified quasi-public agencies .....	30
Number of employees .....	18,385+
Combined expenditures of all identified quasi-public agencies.....	\$3.97 billion
Combined expenditures as percent of state budget.....	13.3%
Number of identified quasias with detailed budgetary info on their website.....	9
Number of identified quasias with checkbook level budget info on their website .....	0
Number of identified quasias with detailed budgetary info on the state’s transparency website .....	0

## ■ Recommendations

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Increased transparency for quasi-public agencies is imperative to ensure good governance and public confidence. Given the lack of oversight on quasi-public agencies due to their relative autonomy from state government and the appointment (rather than election) of the boards that oversee them, it is especially important that they publicly disclose their financial information. We recommend the following steps to make quasi-public agencies more transparent and accountable:

- These agencies should post online all individual expenditures, revenues, audits, bond issuances, discretionary spending, subsidies, board member compensations, contracts, and grants given to private companies.
- This information should be available on Oregon's state transparency website. This will allow for the website to become a more comprehensive source for public financial information by consolidating all government operations—including those of quasi-public agencies—in searchable, easy-to-use format.
- In addition to posting this information on Oregon's state transparency website, there should be a clear link to the information from the quasi-public agency website. If board members are appointed by other public entities, such as a county, then there should be a clear link from that entity's website to the data.
- Where quasi-public entities do not have websites, they should be created.

## ■ Methodology

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Quasi-public agencies were identified using the following definition:

*A quasi-governmental organization, corporation, or agency is a publicly chartered body that provides a public service and is controlled by a government-appointed board. They are not public agencies because they do not principally rely on state funding and operate independent from*

state oversight. Nor can they be classified as private, because they are overseen by state-appointed boards and are given public powers to collect fees or other revenues, as well as to provide public services.

As this report is oriented toward online transparency, information on quasi-public agencies was collected solely through online searches.

# Appendix A:

## Oregon Quasi-Public Agencies with Employee and Budget Data

Quasi Name	Employees	Fiscal Year	Debt	Revenues	Expenses
Oregon Health & Science University	13200	2007-2009	\$590m	\$1.45b	\$1.33b
Port of Portland	782.4	2010-2011	\$688.2m	\$894.5m	\$894.5m
TriMet	2600	2010-2011	\$364.2m	\$866.7m	\$866.7m
SAIF Corporation	842	2009	NA	\$494m	\$442m
Portland Development Commission	200	2010-2011	NA	\$166.3m	\$191m
Housing Authority of Portland	257	2011	\$184m	\$108m	\$109m
Lane Transit District	305	2010-2011	NA	\$89.2m	\$89.2m
Yamhill County Housing Authority	"over 40"	2009	\$18.5m	\$13.5m	\$12.9m
Douglas County Housing Authority	NA	2009	\$10m	\$8.6m	\$9.5m
Lane Regional Air Protection Agency	18	2009	NA	\$2.4m	NA
Linn-Benton Housing Authority	@30	NA	NA	NA	\$12m in rental subsidies
Oregon State Bar Association	@90	NA	NA	NA	\$11m
Mid-Columbia Housing Authority	NA	2010	NA	NA	\$2.3m
Columbia Gorge Housing Authority	NA	2010	NA	NA	\$1.35m
Housing Authority of Umatilla County	18	NA	NA	NA	NA
Clatsop County Housing Authority	3?	NA	NA	NA	NA
Fair Plan Association	NA	NA	NA	NA	NA
Greater Oregon Behavioral Healthcare, Inc.	NA	NA	NA	NA	NA
Prineville Airport Commission	NA	NA	NA	NA	NA
Coos-Curry County Housing Authority	NA	NA	NA	NA	NA
Housing Works (Central Oregon)	NA	NA	NA	NA	NA
Housing Authority of Jackson County	NA	NA	NA	NA	NA
Josephine Housing and Community Development Council	NA	NA	NA	NA	NA
Klamath Housing Authority	NA	NA	NA	NA	NA
Housing and Community Services Agency of Lane County	NA	NA	NA	NA	NA
Housing Authority of Lincoln County	NA	NA	NA	NA	NA
Housing Authority of Malheur County	NA	NA	NA	NA	NA
Northeast Oregon Housing Authority	NA	NA	NA	NA	NA
Northwest Oregon Housing Authority	NA	NA	NA	NA	NA
West Valley Housing Authority	NA	NA	NA	NA	NA

NA= Not Available from their website



# Endnotes

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