

BEFORE THE COUNCIL OF THE  
METROPOLITAN SERVICE DISTRICT

FOR THE PURPOSE OF ADOPTING THE )  
ANNUAL BUDGET OF THE METROPOLITAN )  
SERVICE DISTRICT FOR FISCAL YEAR )  
1981 MAKING APPROPRIATIONS FROM )  
FUNDS OF THE DISTRICT IN ACCORD- )  
ANCE WITH SAID ANNUAL BUDGET AND )  
LEVYING AD VALOREM TAXES )

ORDINANCE NO. 80-97  
Introduced by the Council  
Coordinating Committee

THE COUNCIL OF THE METROPOLITAN SERVICE DISTRICT HEREBY ORDAINS:

SECTION 1. The Council of the Metropolitan Service District (Metro) finds that the Multnomah County Tax Supervising and Conservation Commission held its public hearing June 18, 1980, on the annual budget of Metro for the fiscal year beginning July 1, 1980, and ending June 30, 1981.

SECTION 2. Recommendations from the Tax Supervising and Conservation Commission have been received by Metro and have been acted upon, as reflected in the Budget and in the Schedule of Appropriations.

SECTION 3. The "FY 1981 Budget of the Metropolitan Service District" as attached hereto as Exhibit A to this ordinance and amended by the Council, is hereby adopted.

SECTION 4. The Council of the Metropolitan Service District does hereby levy ad valorem taxes for the Zoo fund as provided in the budget adopted by Section 2 of this Ordinance in the amount of two million dollars (\$2,000,000), said levy being a five-year serial levy outside the six percent constitutional limit approved by district voters on May 25, 1976 (Exhibit B), said that these taxes be, and hereby are, levied and assessed on those taxable properties within the taxing district.

SECTION 5. The Council hereby authorizes expenditures and positions in accordance with the annual budget adopted by Section 2 of this Ordinance, and hereby appropriates funds for the fiscal year beginning July 1, 1980, from the funds and for the purposes listed in the Schedule of Appropriations, Exhibit A, attached hereto and by reference made a part of this Ordinance.

SECTION 6. The Executive Officer shall make the following filings as provided by ORS 294.555 and ORS 310.060:

1. Multnomah County Assessor
  - 1.1 An original and one copy of the Notice of Levy marked Exhibit B, attached hereto and made a part of this Ordinance.
  - 1.2 Two copies of the budget document adopted by Section 2 of this Ordinance.
  - 1.3 A copy of the Notice of Publication provided for by ORS 294.421.
2. Clackamas and Washington County Assessor and Clerk
  - 2.1 A copy of the Notice of Levy, marked Exhibit B.
  - 2.2 A copy of the budget document adopted by Section 2 of this Ordinance.

ADOPTED by the Council of the Metropolitan Service District  
this 26<sup>th</sup> day of June, 1980.

Maiprie Merlin Raftery  
Presiding Officer

ATTEST:

Cynthia M. Wickman  
Clerk of the Council

E X H I B I T A

METROPOLITAN SERVICE DISTRICT

BUDGET FY 1981  
SCHEDULE OF APPROPRIATIONS

General Fund

Personal Services	\$ 2,119,423
Materials and Services	1,350,436
Capital Outlay	14,330
Contingency	657,641
Transfer to Other Funds	150,000
Total General Fund	\$ 4,291,830

Zoo Fund

Personal Services	\$ 1,807,731
Materials and Services	1,311,245
Capital Outlay	216,124
Transfers	275,610
Contingency	642,915
Unappropriated Balance	100,000
General Capital Improvements	2,177,507
Total Zoo Fund	\$ 6,531,132

Solid Waste Operations Fund

Personal Services	\$ 601,237
Materials and Services	5,028,180
Capital Outlay	17,110
Transfers to Other Funds	1,125,893
Contingency	519,460
Unappropriated Balance	0
Total Solid Waste Operations	\$ 7,291,880

Solid Waste Debt Service Fund

Debt Service	\$ 398,063
-Unappropriated Balance	0
Total Solid Waste Debt Service Fund	\$ 398,063

Solid Waste Capital Improvement Fund

Project	\$ 4,077,119
Contingency	0
Total Solid Waste Capital Improvement Fund	\$ 4,077,119

Criminal Justice Assistance Fund

Materials and Services	\$ 1,651,000
Total Criminal Justice Assistance Fund	\$ 1,651,000

Transportation Assistance Fund

Materials and Services	\$ 569,500
Total Transportation Assistance Fund	<u>\$ 569,500</u>

Johnson Creek LID

Personal Services	\$ 25,689
Materials and Services	323,000
Capital Outlay	1,600
Capital Projects	250,000
Transfers	48,384
Contingency	<u>121,327</u>
Total Johnson Creek LID	<u>\$ 770,000</u>

Drainage Fund

Materials and Services	\$ 8,741
Total Drainage Fund	<u>\$ 8,741</u>

TOTAL ALL FUNDS	<u><u>\$25,589,265</u></u>
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CS:bk  
8266/118

A G E N D A M A N A G E M E N T S U M M A R Y

TO: Metro Council  
FROM: Executive Officer  
SUBJECT: Adopting the FY 1981 Budget

APPROVED BY THE METRO COUNCIL

THIS 26<sup>th</sup> DAY OF June 1981

Cynthia M. Wickman  
CLERK OF THE COUNCIL

I. RECOMMENDATIONS:

- A. ACTION REQUESTED: First reading of Ordinance No. 80-97 adopting the FY 1981 Metro budget.
- B. POLICY IMPACT: The Metro budget is a key document setting the policy direction for the organization for the next fiscal year. The policy alternatives have been reviewed by a citizen Task Force, Council Committees and the full Council.
- C. BUDGET IMPACT: The Metro budget, adopted in accordance with State law, establishes the legal authorization to expend public funds.

II. ANALYSIS:

- A. BACKGROUND: The Metro budget has been prepared after a long series of review meetings with the Council and Council Committees stretching back to last November, and reviewed by a special Task Force with citizen representatives. In accordance with State budget law, the Metro budget has been submitted to the Tax Supervising and Conservation Commission (TSCC) for review. That Commission held its public hearing on June 18, 1980, and has returned the budget to the Council for final adoption.

The following changes have been made in the adopted budget in response to the TSCC Review.

Zoo Fund

a. Property Tax Estimate

Increased taxes anticipated to be received	\$147,000
Increase Contingency	\$147,000

Based on TSCC estimates, actual taxes received by Metro are anticipated to be higher than anticipated due to changes in the schedule for receipt of tax collections from the counties.

b. Transfer Merit Contingency

Decrease Personnel Services	(\$8,593)
Increase Contingency	\$8,593

The TSCC directed that the merit contingency indicated in the Zoo fund be transferred from Personnel Services to contingency in conformance with state budget law.

These estimates result in a net increase in the Zoo fund of \$147,000.

B. ALTERNATIVES CONSIDERED: The following changes were presented to the Council at the June 5th meeting and are included in the final adopted budget.

1. General Fund.

- a. Increase private mileage rate from 17¢ to 20¢ per mile. This item was approved by the Council at the June 5th meeting.

Materials and Services	\$3,000
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- b. Add Planner III to the Policy Enforcement Program in the Metropolitan Development Department.

Personnel Services, Including Fringes	\$23,800
Capital Outlay	<u>1,500</u>
	\$25,300

- c. Add new federal grants - Metropolitan Development

Increase Grant Revenues	\$183,500
Increase Materials and Services	183,500

The increased grant amounts is for a Mall Impact Study. Metro will subcontract for studies to be funded by this increase.

These changes will result in a \$28,300 decrease in the General fund contingency, from \$689,941 to \$661,641. The change in the total General fund is an increase of \$183,500.

- d. Change in per diem payments for Councilors. A recommendation will be made on this item by the Council Coordinating Committee and presented to the Council at the June 26th meeting.

2. Solid Waste Fund

All additional funds to the Recycling Program.

Materials and Services	\$50,000
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This change will result in a \$50,000 decrease in the Solid Waste fund contingency from \$519,600 to \$469,460. There is no net change in the Solid Waste fund.

3. Johnson Creek LID

Transfer from Personnel Service to Materials

Decrease Personnel Services	(\$23,730)
Increase Materials and Services	23,730

This change anticipates that the right-of-way acquisition work will be done on contract rather than by Metro staff.

There is no net change in this fund.

C. CONCLUSION: First reading of Ordinance No. 80-97 adopting the FY 1981 Budget.

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8264/118

A G E N D A M A N A G E M E N T S U M M A R Y

TO: Metro Council  
 FROM: Executive Officer  
 SUBJECT: Adopting the FY 1981 Budget

I. RECOMMENDATIONS:

- A. ACTION REQUESTED: First reading of Ordinance No. 80-97 adopting the FY 1981 Metro budget.
- B. POLICY IMPACT: The Metro budget is a key document setting the policy direction for the organization for the next fiscal year. The policy alternatives have been reviewed by a citizen Task Force, Council Committees and the full Council.
- C. BUDGET IMPACT: The Metro budget, adopted in accordance with State law, establishes the legal authorization to expend public funds.

II. ANALYSIS:

- A. BACKGROUND: The Metro budget has been prepared after a long series of review meetings with the Council and Council Committees stretching back to last November, and reviewed by a special Task Force with citizen representatives. In accordance with State budget law, the Metro budget has been submitted to the Tax Supervising and Conservation Commission (TSCC) for review. That Commission will hold public hearings on June 18, 1980, and return the budget to the Council for final adoption on June 26, 1980.

The Council will be able to make adjustments in the final budget after the hearings before the TSCC when final action is taken adopting the budget on June 26.

- B. ALTERNATIVES CONSIDERED: The following issues were discussed by the Council at the hearing on the proposed budget. Action may be taken on these items when the budget is adopted.

1. General Fund

- a. Add a Planner III to the Policy Enforcement Program in the Metropolitan Development Department

Cost:

Salary, including Fringes	\$23,800
Support Costs	<u>1,500</u>
	\$25,300



- b. The Council Coordinating Committee recommended increasing the number of meetings at which per diem can be paid from five to six meetings a month and keeping the rate at \$30 per day.

Cost: \$4,320

- c. The Committee also recommended indexing the mileage rate paid for use of personal car on official business to the rate paid by the federal government. This would increase the rate from 17¢ per mile to 20¢.

Total Cost: \$3,000

Total General Fund Contingency	\$689,941
Total Transfers	<u>32,620</u>
New Contingency Balance	\$657,321

2. Solid Waste Fund

Add additional funds to the Recycling Program in Solid Waste to establish a grant assistance fund to support proposed recycling efforts in addition to the two Metro operating sites.

Cost: \$50,000

Total Solid Waste Operating Contingency	\$519,460
Transfers	<u>50,000</u>
New Contingency Balance	\$469,460

3. Johnson Creek LID

The staff will recommend making a transfer in the Johnson Creek Local Improvement District fund shifting \$23,730 from Personnel Services to Material and Services. This change anticipates that the right-of-way acquisition work will be done on contract rather than by a Metro staff member.

There is no net change in this fund.

- C. CONCLUSION: First reading of Ordinance No. 80-97 adopting the FY 1981 Budget.

E X H I B I T A

METROPOLITAN SERVICE DISTRICT

BUDGET FY 1981  
SCHEDULE OF APPROPRIATIONS

General Fund

Personal Services	\$ 2,095,623
Materials and Services	1,159,936
Capital Outlay	12,830
Transfers to Other Funds	689,941
Contingency	150,000
Total General Fund	\$ 4,108,330

Zoo Fund

Personal Services	\$ 1,816,324
Materials and Services	1,311,245
Capital Outlay	216,124
General Capital Improvements	275,610
Transfers to Other Funds	487,322
Contingency	100,000
Unappropriated Balance	2,177,507
Total Zoo Fund	\$ 6,384,132

Solid Waste Operations Fund

Personal Services	\$ 601,237
Materials and Services	5,028,180
Capital Outlay	17,110
Transfers to Other Funds	1,125,893
Contingency	519,460
Unappropriated Balance	0
Total Solid Waste Operations	\$ 7,291,880

Solid Waste Debt Service Fund

Debt Service	\$ 398,060
-Unappropriated Balance	0
Total Solid Waste Debt Service Fund	\$ 398,060

Solid Waste Capital Improvement Fund

Project	\$ 4,077,119
Contingency	0
Total Solid Waste Capital Improvement Fund	\$ 4,077,119

Criminal Justice Assistance Fund

Materials and Services	\$ 1,651,000
Total Criminal Justice Assistance Fund	\$ 1,651,000

Transportation Assistance Fund

Materials and Services	\$ 569,500
Total Transportation Assistance Fund	<u>\$ 569,500</u>

Johnson Creek LID

Personal Services	\$ 48,689
Materials and Services	300,000
Capital Outlay	1,600
Capital Projects	250,000
Transfers	48,384
Contingency	<u>121,327</u>
Total Johnson Creek LID	<u>\$ 770,000</u>

Drainage Fund

Materials and Services	\$ 8,741
Total Drainage Fund	<u>\$ 8,741</u>

TOTAL ALL FUNDS	<u><u>\$25,258,762</u></u>
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CS:bk  
8266/118

NOTICE OF PROPERTY TAX LEVY
Clackamas, Multnomah, Washington
To the Assessor of \_\_\_\_\_ County

INFORMATION AND INSTRUCTIONS ON REVERSE SIDE

Part I: TOTAL PROPERTY TAX LEVY

On June 26, 1980, the Council (Governing Body) of the Metropolitan Service District, Clackamas, Multnomah, Washington County, Oregon, levied a tax as follows:

Table with 5 rows and 3 columns: Description, Funded Partially By State of Oregon, Funded Totally By Local Taxpayers. Row 2: \$2,000,000.00. Row 5: \$2,000,000.00.

Part II: TAX BASE WORKSHEET

ATTENTION: Action by the 1979 Legislature requires that a new tax base be voted on at the next General or Primary Election if the taxing unit has levied outside its tax base.

6. VOTED TAX BASE, IF ANY—On \_\_\_\_\_, 19\_\_\_\_, a majority of the voters approved a tax base in the amount of \_\_\_\_\_

CONSTITUTIONAL LIMITATION

Tax Base Portion of Preceding Three Levies

Three empty boxes for tax base portions.

7-1-19\_\_\_\_ 7-1-19\_\_\_\_ 7-1-19\_\_\_\_

7. Largest of above: 7a multiplied by 1.06 = 7b

ADJUSTMENT FOR ANNEXATION INCREASES DURING PRECEDING FISCAL YEAR

8. True Cash Value of area annexed on \_\_\_\_\_, 19\_\_\_\_ (attach list of annexation dates and valuations) 8

9. Tax Base Rate per \$1,000 True Cash Value of annexing entity 9

Annexation Increase: 10. (line 8 times line 9) = 10a multiplied by 1.06 = 10b

ADJUSTED TAX BASE

11. Largest of (Line 7b plus Line 10b) or (Line 6 plus Line 10b) 11

Part III: LIMITATIONS PER OREGON REVISED STATUTES (Does Not Apply To All Municipal Corporations)

12. The TOTAL amount of Line 5 levied within the statutory limitation 12

13. The TOTAL amount of Line 5 levied outside the statutory limitation 13

Date: \_\_\_\_\_, 19\_\_\_\_
By: \_\_\_\_\_ Title: \_\_\_\_\_ Bus. Phone: \_\_\_\_\_
(Signature of Authorized Official)

**PART IV SCHEDULE OF SPECIAL LEVIES**

**FORM LB-60 AND SAMPLE BALLOTS FOR LEVY ELECTIONS APPROVED IN CALENDAR YEARS 1979 AND 1980 FOR THE 1980-81 FISCAL YEAR MUST BE ATTACHED TO THIS FORM.**

Purpose of Levy	Date Approved	Are taxes inside Adjusted Levy? Yes or No	CONTINUING LEVY (see note below this schedule.)	First Year Levied	Final Year To Be Levied	Continuing Tax Authorized Each Year	Total Tax Authorized	Tax Levied This Year
One-year Special Levy Outside Tax Base								
Zoo	May 25, 1976			1970	1981	\$2,000,000	\$10,000	\$2,000,000
<b>TOTAL SPECIAL LEVIES: (This amount should equal total of Lines 2 and 3 Part I of this form)</b> .....								

NOTE: If approved prior to July 21, 1953 enter as mills. If approved September 13, 1967 to January 1, 1972 enter tax rate.

**GENERAL INSTRUCTIONS**

The Notice of Property Tax Levy is used to certify the property tax levy of your district to the county assessor.

The Notice is to be completed after the public hearing(s) has been held, the proper ordinance or resolution enacted, the appropriations made and the property tax levy determined. The Notice and other required documents are to be submitted on or before July 15. Should circumstances exist that prevent these items from being filed by July 15, AN EXTENSION OF TIME MUST BE REQUESTED FROM THE COUNTY ASSESSOR.

The Notice of Property Tax Levy, a true and complete copy of the adopted budget document, the resolution or ordinance adopting and appropriating the budget, Form LB-60 (Levy Computation Worksheet), sample ballots of any levy elections approved for the ensuing fiscal year, and either a newspaper clipping; or, if posted or mailed, a copy of the financial summary (from Publication Packet) are to be distributed as follows:

- (1) One copy to the county clerk.
- (2) Two copies to the assessor of each county in which the district is located.
- (3) One copy to the county treasurer if the district's bonded indebtedness is paid by that office. School districts are also required to send one copy to the ESD Superintendent, and one copy to the Oregon Department of Education, School Finance Section, Salem, OR 97310.

**SPECIFIC INSTRUCTIONS:**

**PART I**—Enter the date, name of governing body, name of municipal corporation, and county in the appropriate spaces.

Line 1—Enter the portion of the tax levy that is within your tax base as computed in Part II.

Line 2—Enter the total of those special levies for operating purposes (one year, serial, millage, or fixed) that were approved by the voters within the limitation determined on Form LB-60, line 17, and minus the tax based on line 1 of this form (and scheduled above under Special Levies).

Line 3—Enter the total of tax levies approved by the voters in excess of the amount shown on Form LB-60, Line 17, minus Line 4 on this form (and scheduled above under Special Levies).

Line 4—Enter the portion of that tax levy necessary for the payment of bonded indebtedness.

Line 5—The total tax levy must be equal to or less than the amount published in the newspaper. If the total tax levy is greater than that amount published, the municipal corporation must republish the entire budget summary with revisions and hold another public hearing.

**PART II**—Enter the municipal corporation's voted tax base, if any, in the space provided.

Enter the tax base portion of the preceding three levies in the boxes provided and indicate the year of the levy.

Line 7(a & b)—Multiply the largest of the three levies by 1.06 and enter the amount.

Line 8—If the municipal corporation has annexed adjoining property during the last fiscal year ending June 30, enter the date of annexation and the true cash value of the annexed property during the last fiscal year. If more than one annexation, please attach an additional schedule listing separately the date of annexation and true cash value of the annexed property during the last fiscal year.

Line 9—Enter last year's tax base rate per \$1,000 of assessed value for the annexing entity.

Line 10(a & b)—Multiply the amount entered on line 8 by line 9. Multiply the answer by 1.06 to determine the annexation increase to the tax base.

Line 11—Determine the Adjusted Tax Base by entering the largest figure of (Line 7b plus Line 10b) or (Voted Tax Base plus Line 10b).

**EXAMPLE FOR PART II**

Assessed Value of Annexing Entity—Last Year .....	\$400 Million
Tax Base of Annexing Entity—Last Year .....	\$2 Million
Tax Base Rate (2,000,000 ÷ 400,000,000 = .005) .....	\$5 per \$1,000
Assessed Value of Annexed Area—Last Year .....	\$100 Million
Annexation Increase (\$100,000,000 × .005 × 1.06) .....	\$530,000

**PART III**—All municipal corporations are subject to a 6% levy limitation imposed by the Oregon Constitution, and some are further limited by statutory provisions. For those districts that are subject to statutory limitations such as hospital districts, road districts, vector control districts, etc., complete items 12 and 13 by inserting the dollar amount the district can levy within and outside those statutory limitations. The percentage limitation imposed by the statute and the assessed valuation of the taxing unit from the most recent taxroll are used to compute this limitation.

**PART IV**—Enter all special levies on the schedule. Do NOT enter levies for bonded indebtedness or tax base levies.

NOTE: If you require assistance in completing this form, please contact your county assessor or the Oregon Department of Revenue, Local Budget Unit, Salem (Phone: 378-3749).





METROPOLITAN SERVICE DISTRICT  
527 SW. HALL ST., PORTLAND, OR. 97201, 503/221-1646

## MEMORANDUM

Date: June 5, 1980  
To: Metro Council  
From: Executive Officer  
Regarding: Addendum to Agenda Management Summary for  
Item 3.3 of June 5 Agenda, FY 1981 Budget

The following should be inserted as Item 1.d on page 2 of the Agenda Management Summary for the FY 1981 budget:

- d. The Executive Officer has agreed with Portland State University to be the grant recipient for the \$200,000 Mall Impact Study. Metro will subcontract \$183,500 of this amount to four subcontractors in approximately the following amounts:

Portland State University	\$100,000
Tri-Met	26,000
City of Portland	47,500
Appraisal Firm	10,000
	<u>\$183,500</u>

ORDINANCE NO. 80-97

TITLE FOR THE PURPOSE OF ADOPTING THE ANNUAL BUDGET OF THE METROPOLITAN SERVICE DISTRICT FOR FISCAL YEAR 1981 MAKING APPROPRIATIONS FROM FUNDS OF THE DISTRICT IN ACCORDANCE WITH SAID ANNUAL BUDGET AND LEVYING AD VALOREM TAXES

DATE INTRODUCED June 5, 1980  
 FIRST READING June 5, 1980  
 SECOND READING June 26, 1980  
 DATE ADOPTED June 26, 1980  
 DATE EFFECTIVE July 1, 1980

ROLLCALL

	Yes	No	Abst.
Burton	X		
Stuhr	X		
Williams	X		
Berkman			X
Kirkpatrick			X
Deines	X		
Rhodes	X		
Schedeen	X		
BONNER <del>XXXX</del>			X
Banzer	X		
Peterson	X		
Kafoury	X		