

BEFORE THE COUNCIL OF THE  
METROPOLITAN SERVICE DISTRICT

FOR THE PURPOSES OF AMENDING            )       ORDINANCE NO. 87-235A  
METRO CODE SECTION 4.01.060            )  
REVISING ADMISSION FEES AND            )  
POLICIES AT THE WASHINGTON PARK        )  
ZOO                                        )

THE COUNCIL OF THE METROPOLITAN SERVICE DISTRICT HEREBY ORDAINS:

1. That the Washington Park Zoo Admission Fees and Policies,  
incorporated in Metro Code Section 4.01.060(a) is amended to read:

4.01.060 Admission Fees and Policies:

(a) Regular Fees.

(1) Definitions:

(A) "School Group" is defined as a group of five or more students of a state accredited school elementary, middle, junior and senior high schools or registered pre-school/daycare center including at least one chaperone for every five students of high school age or under. Registration for a specified visit date at least two weeks in advance is required in order for a school group to qualify for the school group rate.

(B) "Group Other Than School Group" is defined as any group, other than a school group, of twenty-five (25) or more members who have purchased tickets at least one day in advance. All advance tickets shall bear an expiration date not to exceed six (6) months from the date of issuance.

(2) Fee Schedule:


Adult (12 years and over)	\$3.00
Youth (3 years through 11 years)	\$1.50
Child (2 years and under)	free
Senior Citizen (65 years and over)	\$1.50
School Groups (per student)	\$1.00
Chaperones accompanying school groups	\$1.00
Groups other than school groups 25 or more per group	20% discount

Metro Code Section 4.01.060(e) is amended to read:

(e) Commercial Ventures: Proposed commercial or fund-raising ventures with private profit or nonprofit corporations involving admission to the Zoo must be authorized in advance by the Executive Officer. The Executive Officer may approve variances to the admission fees to facilitate such ventures. (Ordinance No. 81-108, Sec. 2; amended by Ordinance No. 85-185, Sec. 1)

2. The changes in the Fee Schedule in subsection 1. of this ordinance shall be effective on April 1, 1988.

ADOPTED by the Council of the Metropolitan Service District  
this 22nd day of December, 1987.

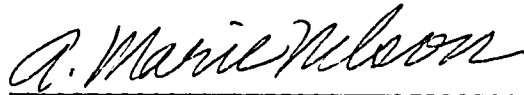
  
\_\_\_\_\_  
Jim Gardner  
Deputy Presiding Officer

DEC/gl  
8716C/525  
12/29/87

ATTEST:

  
\_\_\_\_\_  
Clerk of the Council

I certify this ordinance was not  
vetoed by the Executive Officer

  
\_\_\_\_\_  
Clerk of the Council  
January 4, 1988  
\_\_\_\_\_  
Date

65 working days after date of approval. Mr. Carlson said if an emergency clause were invoked to obtain an earlier date, Councilors would have to vote unanimously.

February 1, 1988, was decided upon as the first day of the new rates.

Motion: Councilor DeJardin moved that Zoo admission rates increase as of February 1, 1988.

Vote: Councilor Kirkpatrick seconded on the condition that legal counsel approved use of the emergency clause. Councilors were unanimous and the motion passed.

Item Three of Mr. Carlson's memorandum concerned the date of the beginning of the rate increase, so the issue was resolved, Councilor Kirkpatrick noted, in Councilors' motion to approve the increased Zoo admission rate.

The next item for discussion was a proposed ordinance change in policy or practices regarding use of Zoo facilities or services. The Zoo policy has been to have the public pay regular Zoo admission rates for whatever activity they chose to attend such as concerts or other special events. Mr. Carlson said the rationale previously was to attract the public to, and have them experience, the Zoo and pay admission fees to increase attention to the facility. Councilors thought the proposed ordinance change would affect the good feeling of the business community who might perceive the Zoo as entering into competition with the hospitality industry. Staff reiterated such a change would make for a total "Zoo experience." Mr. Carlson stated that the Zoo is a tax-supported institution and should not compete with the private sector for catering services. Staff gave examples of several functions the Zoo had hosted which they only felt reflected the total "Zoo experience."

Councilors ultimately decided that Clause (F) of Ordinance No. 87-235 For the Purposes of Amending Metro Code Section 4.01.060 Revising Admission Fees and Policies at the Washington Park Zoo should be deleted. Councilors agreed to restore the original language of Clause (E) of the Ordinance, eliminate proposed new language, and add one sentence to the end -- "The Executive Officer may approve variances to the admission fee schedule to facilitate such ventures."

All business on the agenda having been attended to, Chair Kirkpatrick adjourned the Committee at 1:45 p.m.

Respectfully submitted,

*Paulette Allen*

Paulette Allen, Clerk  
D.1/ZPC.3

MINUTES OF THE METROPOLITAN SERVICE DISTRICT

COUNCIL ZOO PLANNING COMMITTEE

December 18, 1987

Zoo Meeting Center

Committee Members Present: Tom DeJardin, Mike Bonner, Corky Kirkpatrick

Staff Present: McKay Rich, Jane Hartline, Ellen Lanier Phillips, Dennis Pate, Gayle Rathbun, Don Carlson

Chair Kirkpatrick called the meeting to order at 12:16 p.m.

1. Consideration of Ordinance No. 87-235, for the Purpose of Amending the Metro Code Section 4.01.60 Revising Admission Fees and Policies at the Washington Park Zoo

Chair Kirkpatrick said Don Carlson, Council Administrator, would make an opening statement and then Zoo staff would make their statements.

Mr. Carlson referred to the staff report included in the Council agenda packet for the full Council meeting of December 10, 1987. He also referred to his memorandum dated December 9, 1987, entitled "Council Meeting, December 10, 1987, Agenda Item 8.1." Mr. Carlson said the memorandum addressed three issues: 1) Need for Fee Increase; 2) Policy Changes; and 3) Effective Date of Ordinance. He stated for the past three years, the operating policy of the Zoo has been met by 50 percent tax revenue and 50 percent non-tax revenues. Mr. Carlson said that was a major policy to keep in mind when considering the Master Plan. Another major policy to remember was historically the Zoo has transferred surplus revenues to its Capital fund.

Mr. Carlson said he had prepared a Table II which followed the same format as the Table I attached to his memorandum which showed year-to-date expenditures such as the ratio of non-tax revenue to operating costs through November 30, 1987. Table II shows actual attendance, operating and maintenance costs, and transfer of funds. Nontax revenue showed itself to be 61 percent of the operating and maintenance costs year-to-date. The balance remaining, Mr. Carlson said, was a projection of what remained in the budget.



Mr. Kay Rich, Acting Zoo Director, gave his reasons for a Zoo admission increase. Mr. Rich said the 61 percent figure was representative of the "best part of the year." Mr. Rich said in 1983 the Zoo earned 55 percent of its net income. In 1983-84, 52 percent; 1985, 54 percent; 1986, 51 percent; and in 1987 (to-date) 57 percent. Mr. Rich said, "1987 was the most exceptional year since I have been here."

Mr. Rich handed out estimated projections of next year's Zoo attendance. Originally, he said, an attendance of 820,000 was projected; that figure was expanded to 890,000. Mr. Rich said although attendance was high in 1987, staff expected attendance to drop by comparison next year for a variety of reasons. Attendance would seem low in 1988 compared to the large volume of visitors who came to the Zoo to see the Golden Monkey exhibit, the new baby elephant, the polar bear exhibit, the Zoo's centennial celebration, the newly constructed elephant museum, and the American Association of Zoos and Public Aquariums (AAZPA) conference. Mr. Rich said a baby elephant birth was not expected this year and neither were any other "unusual births."

Staff corroborated Mr. Rich's testimony. Dennis Pate, General Curator, said the Golden Monkey birth was an "exceptional birth." Ellen Lanier Phelps, Development Director, said the average attendance on the same date of the Polar Bear Exhibit opening in 1987 in 1986 was 3,500. The Polar Bear Exhibit drew 8,000 people. Roger Yerke, Educational Services Specialist, said last year was the end of an El Nino cycle, which was responsible for the exceptionally good weather, and another cycle is not be expected for seven years. Mr. Rich said after this intended rate increase, another one was projected, but if the increase requested now was approved, the next one could be postponed to January 1990.

Mr. Rich said the Highway Department planned to rework the ramp leading to the Zoo. He said there were some increased costs that were not previously expected, including the anticipated increase in minimum wages, expenditures on the Visitor Services Building, and other Zoo maintenance costs. The other Zoo maintenance costs include a new elephant barn roof, new roofs for other buildings, paving, utility costs, new equipment, and a needed soil stabilization, Mr. Rich said. For these reasons, he preferred to have an increase in the Zoo admission price. If there were extra funds left over, they could be transferred to the capital fund and used for the necessary costs explained by staff.

Councilors and staff discussed when the Zoo admission price would increase. Staff did not want admission rates raised in summer because it would cause public bad feeling. Councilors asked if it would be possible to institute new rates in April. Staff said that was a problem -- a great deal of attendance was generated by students on Spring vacation. Also, staff wanted to generate the new admission rate information before Spring vacation so teachers would be informed. Councilor Bonner mentioned the 90-day emergency clause. Mr. Carlson said without the emergency clause, the rate increase would take place



# METRO

2000 S.W. First Avenue  
Portland, OR 97201-5398  
503/221-1646

Agenda Item 8.1

December 22, 1987

Mr. Donald E. Carlson  
Council Administrator  
Metropolitan Service District  
2000 S. W. First Avenue  
Portland, OR 97201-5398

Dear Don:

Re: "Emergency" Need for Zoo Admission Increase

You have asked under what circumstances the Council may, if it adopts Ordinance No. 87-235 on December 22, 1987, provide for the proposed increase in Zoo admission fees to take effect prior to March 22, 1988. Oregon law provides:

"ORS 268.515(1) A district may impose and collect service and user charges..."

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"(7) Except in an emergency, the imposition of or increase in a service or user charge shall not become effective until 65 business days after approval by the governing body. As used in this subsection, business days mean Monday through Friday."

As I have indicated to you previously, I think there is some doubt as to whether the Legislature intended to have ORS 268.515 apply to Zoo admission fees as opposed to Metro's solid waste service fees and user charges. However, assuming the statute is to be construed to mean what it seems to say, Zoo admission fees cannot be increased without a delayed effective date except in an emergency.

In that one purpose of such delay period is to preserve the right of referendum, I believe the type of emergency found to exist that would defeat this right must be directly related to the substance of the ordinance. That is to say, the emergency should be directly related to the need to increase the fee. If Metro needs more money to keep facilities open then it can override the delay period. Otherwise it probably cannot.

Yours very truly,

Daniel B. Cooper  
General Counsel

gl/8721C/D4

Metro Council  
Richard Waker  
Presiding Officer  
District 2  
Jim Gardner  
Deputy Presiding  
Officer  
District 3  
Mike Ragsdale  
District 1  
Corky Kirkpatrick  
District 4  
Tom DeJardin  
District 5  
George Van Bergen  
District 6  
Sharon Kelley  
District 7  
Mike Bonner  
District 8  
Tanya Collier  
District 9  
Larry Cooper  
District 10  
David Knowles  
District 11  
Gary Hansen  
District 12  
Executive Officer  
Rena Cusma

CONSIDERATION OF ORDINANCE NO. 87-235 FOR THE  
PURPOSE OF AMENDING THE METRO CODE SECTION  
4.01.060 REVISING ADMISSION FEES AND POLICIES AT  
THE WASHINGTON PARK ZOO

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Date: December 2, 1987

Presented by: A. M. Rich

FACTUAL BACKGROUND AND ANALYSIS

In January 1984, the Metro Council adopted Resolution No. 84-444, which set forth financial principles and policies for the District. The specific financial policies relating to the operation of the Zoo include the following:

1. The Zoo shall rely on the property tax for a portion of its revenue;
2. A ratio of approximately 50 percent tax and 50 percent non-tax revenues shall be maintained for funding Zoo operations;
3. The Council shall annually review admission fees to assist in meeting policy 2 above; and
4. Any operating fund surplus will be periodically transferred to the Capital Improvement fund to implement the Zoo's Master Plan.

The Five-Year Financial Plan presented to the Council in January 1987 projected revenues and costs in accordance with these policies. Revenue projections were based not only on continued property tax support, but also on periodic admission fee adjustments, the next of which was projected for January 1, 1988. The last fee increase became effective February 1, 1985. It established the admission fees at the present \$2.50 for adults and \$1.25 for senior citizens and children, maintaining a 2:1 price ratio. The recommended new fee schedule is \$3.00 for adults, \$1.50 for senior citizens/children, and \$1.00 for individuals in school groups. It is also proposed that Metro adopt a single discount rate of 20 percent for groups with 25 or more individuals. The recommended new fee schedule was used to project admission revenues for the FY 1987-88 budget.

Table I shows projected non-tax revenues, as a percent of operation and maintenance costs for FY 1987-88 to 1990-91, as proposed in the Five-Year Financial Plan. The new admission fee

schedule will assist in providing non-tax revenues at 48 percent of operation and maintenance costs in FY 1987-88, and at 50 percent of operation and maintenance costs in FY 1988-89.

TABLE I

Non-Tax Revenues as a Percent of Operation and Maintenance Costs

	<u>FY 87-88<sup>c</sup></u>	<u>FY 88-89</u>	<u>FY 89-90</u>	<u>FY 90-91</u>
Operation and Maintenance Costs <sup>a</sup>	\$7,497,774	\$8,019,759	\$8,493,089	\$8,888,942
Non-Tax Revenues <sup>b</sup> (Admission increases on January 1, 1988 & 1990)	3,597,520	4,024,035	4,441,762	4,853,433
Percent of Operation and Maintenance Costs	48%	50%	52%	55%

The actual level of admissions and revenues during the fiscal year are subject to weather conditions and other non-calculable circumstances. Actual amounts may vary either positively or negatively compared to projections. So far this fiscal year admissions revenues are greater than estimated. Expenses are also greater than estimated. If revenue increases exceed cost increases into the spring, the excess revenue could be applied towards projects outlined in the Master Plan, as directed in the Metro guidelines.

The proposed fee increase is necessary to maintain the 50 percent non-tax operating revenue goal established for the Zoo. The increase is readily justifiable based on the expanded services provided by the Zoo since 1985 in the areas of Capital Improvements and programming.

Capital Improvements

The newest improvement will be the opening next spring or early summer of the first part of the Africa Exhibit. The other major capital improvements at the Zoo since February 1985 include:

1. The Alaska Tundra Exhibit
2. The Polar/Sun Bear Exhibit
3. The Elephant Museum

<sup>a</sup> Includes Personal Services, Materials & Services, Capital Outlay, Contingency, Insurance, Building, and General fund transfers.

<sup>b</sup> Includes all non-property tax revenues except for the fund balance.

<sup>c</sup> Figures are those in the adopted FY 1987-88 budget.

## Programming

The expanded programming at the Zoo includes:

1. Birds of Prey Show
2. Animal Keeper Talks
3. "World of Reptiles" Show
4. Traveling Exhibit

The new exhibits, animals, and programming have contributed to lengthening the average stay per visit: 51 percent of the visitors surveyed in May 1987 reported staying three hours or longer compared to 45 percent in May 1985; 88 percent of the May 1987 visitors stayed at least two hours compared to 83 percent in 1985. The additional time spent at the Zoo represents an increased value to the visitor for the admission price.

The proposed admission rate at the Zoo still remains a bargain compared to similar institutions in the West, as shown in Table II. Disadvantaged residents of the Metro and surrounding areas may still take advantage of the free admission every Tuesday after 3:00 p.m. and the other special free days offered during the year.

TABLE II

### Admission Rates at Western Institutions

	Adults	Seniors	Youth
Wildlife Safari (Winston)	\$6.50	\$4.50	\$4.50
OMSI	5.00	3.00	3.00
Los Angeles Zoo	4.50	3.50	2.00
Hogle Zoo (Salt Lake City)	4.00	2.00	2.00
San Francisco Zoo	3.50	1.00	Free
Woodland Park Zoo (Seattle)	3.00	.50	1.00
Washington Park Zoo	2.50	1.25	1.25
Point Defiance Zoo (Tacoma)	2.50	1.50	1.50
Sacramento Zoo	2.50	1.00	1.00
World Forestry Center	2.00	1.00	1.00
Average	\$3.60	\$1.93	\$1.73

### Additional Ordinance Changes

The increased level of activities and programming at the Zoo has generated a need for additional flexibility in establishing admission fees for various events. With the proposed change of section (e), the Zoo would be able to take advantage of opportunities involving "big name" performers for one or two special concerts a year. An additional charge for the event would be possible to defray costs. A greater number of community events such as corporate-sponsored free days, etc., could be offered if the Zoo were able to adjust fees. For example, in some cases, lower per capita fees charged to a corporation for their sponsorship of a free

day could be more than returned in free advertising and increased levels of attendance.

The addition of section (f) to the Code would allow a reduced or eliminated admission fee for catered events after normal Zoo hours. Groups not utilizing all the Zoo amenities could be offered a reduced admission charge.

EXECUTIVE OFFICER'S RECOMMENDATION

The Executive Officer recommends adoption of Ordinance No. 87-235.

AMR/gl  
8612C/525

BEFORE THE COUNCIL OF THE  
METROPOLITAN SERVICE DISTRICT

FOR THE PURPOSES OF AMENDING )      ORDINANCE NO. 87-235  
METRO CODE SECTION 4.01.060 )  
REVISING ADMISSION FEES AND )  
POLICIES AT THE WASHINGTON PARK )  
ZOO )

THE COUNCIL OF THE METROPOLITAN SERVICE DISTRICT HEREBY ORDAINS:

That the Washington Park Zoo Admission Fees and Policies,  
incorporated in Metro Code Section 4.01.060(a) is amended to read:

4.01.060 Admission Fees and Policies:

(a) Regular Fees.

(1) Definitions:

(A) "School Group" is defined as a group of five or more students of a state accredited school elementary, middle, junior and senior high schools or [licensed] registered pre-school/daycare center including at least one chaperone for every five students of high school age or under. Registration for a specified visit date at least [one day] two weeks in advance is required in order for a school group to qualify [as a] for the school group rate.

(B) "Group Other Than School Group" is defined as any group, other than a school group, of [15] twenty-five (25) or more members who have purchased tickets at least one day in advance. All advance tickets shall bear an expiration date not to exceed six (6) months from the date of issuance.

(2) Fee Schedule:

Adult (12 years and over)	[\$2.50]	\$3.00
Youth (3 years through 11 years)	[\$1.25]	\$1.50
Child (2 years and under [3 years])		free
Senior Citizen (65 years and over)	[\$1.25]	\$1.50
School Groups (per student)	[\$ .75]	\$1.00
Chaperones accompanying school groups	[free]	\$1.00
Groups other than school groups		
[15 to 49 per group		10% discount]
[50 to 99 per group		15% discount]
[100] <u>25</u> or more per group		20% discount

Metro Code Section 4.01.060(e) and (f) are amended to read:

(e) [Commercial Ventures] Special Events: [Proposed commercial or fund-raising ventures with private profit or nonprofit corporations involving admission to the Zoo must be authorized in advance by the Executive Officer.] Admission fee rates established by this Ordinance may be reduced, increased or eliminated for certain special events such as concerts, etc., at the discretion of the Director, following approval by the Executive Officer. (Ordinance No. 81-108, Sec. 2; amended by Ordinance No. 85-185, Sec. 1)

(f) After-Hours Catered Events: The admission fee may be reduced or eliminated for events catered by the Zoo after normal visiting hours, at the discretion of the Director, following approval by the Executive Officer.

ADOPTED by the Council of the Metropolitan Service District  
this \_\_\_\_\_ day of \_\_\_\_\_, 1987.

\_\_\_\_\_  
Richard Waker, Presiding Officer

RB/gl  
8612C/525  
12/14/87

*Not adopted --  
See 87-235A*



8.1 Consideration of Ordinance No. 87-235, for the Purpose of Amending Metro Code Section 2.04.060 Revising Admission Fees and Policies at the Washington Park Zoo (Second Reading)

The Clerk read the Ordinance a second time by title only. Presiding Officer Waker announced that the first reading and public hearing was held on December 10. The ordinance was subject to the Executive Officer's veto.

Motion: The motion to adopt the ordinance was made by Councilor Kirkpatrick, seconded by Councilor DeJardin, on December 10, 1987.

Councilor Kirkpatrick reviewed the Zoo Committee's written recommendation: 1) fees be increased effective February 1, 1988; and 2) the ordinance not be amended as originally proposed which would have created special fees for after-hours catered events. The Executive Officer would have the authority to approve variances to admission fees to facilitate commercial ventures, however.

Motion to Amend: Councilor Kirkpatrick moved, seconded by Councilor DeJardin, to adopt the amendments embodied in Ordinance No. 87-235A as recommended by the Zoo Committee.

A discussion followed about whether fee increases were necessary. Councilor Kirkpatrick reported the Committee had determined increases were necessary to finance increased capital costs.

Councilor Kelley questioned the practice of raising admissions so that additional capital revenue would be spent to upgrade concessions. She thought lower admission rates would increase attendance which would result in higher revenues.

After discussion, the majority of Councilors expressed satisfaction with the Zoo Committee's recommendations and thought Zoo admission fees competitive, if not lower than, other attractions in the state.

Vote on the Motion to Amend: A roll call vote on the motion to amend the ordinance resulted in:

Ayes: Councilors Bonner, Cooper, DeJardin, Gardner, Hansen, Kelley, Kirkpatrick, Knowles, Ragsdale, Van Bergen and Waker

Nay: Councilor Collier

The motion to amend carried.

Vote on the motion to Adopt the Ordinance: A roll call vote on the main motion resulted in:

Ayes: Councilors Bonner, Cooper, DeJardin, Gardner, Hansen, Kelley, Kirkpatrick, Knowles, Ragsdale, Van Bergen and Waker

Nay: Councilor Collier

The motion carried and the Ordinance was adopted.

Councilor Van Bergen requested the Budget Committee review the issue of non-tax Zoo revenue being applied to capital outlay projects.

8.2 Consideration of Ordinance No. 87-236, for the Purpose of Revising the Fee Schedule for Petitions to Amend the Urban Growth Boundary (First Reading and Public Hearing)

The Clerk read the ordinance by title only a first time.

Ray Phelps, Finance & Administration Director, and Jill Hinckley, Land Use Coordinator, presented staff's report. The fee changes were being proposed so that fees charged by Metro would more closely correspond to the actual expense of hearing each case.

Presiding Officer Waker and Councilor Kirkpatrick encouraged a system where a ceiling would be placed on costs to petitioners.

Discussion continued and it was agreed the ordinance should be referred to the Council Management Committee for review and recommendation. The Presiding Officer concurred.

Motion: Councilor Knowles moved, seconded by Councilor DeJardin, to adopt Ordinance No. 87-236.

Presiding Officer Waker opened the public hearing. There was no testimony and the hearing was closed. He explained the ordinance would be reviewed by the Council Management Committee on January 21 and would be before the Council for a second reading on January 28, 1988.

8.3 Consideration of Ordinance No. 87-237, for the Purpose of Creating an Office of General Counsel (First Reading and Public Hearing)

The Clerk read the ordinance by title only a first time.



Motion: Councilor DeJardin moved, seconded by Councilor Kelley, to adopt Resolution No. 87-829.

Vote: A vote on the motion resulted in all ten Councilors present voting aye. Councilors Cooper and Knowles were absent.

The motion carried and Resolution No. 87-829 was unanimously adopted.

In response to Councilor Hansen's question, Executive Officer Cusma said she would develop a policy to assist Metro employees who abused drugs. The proposed policy would be brought back to the Council for future consideration.

8.1 Consideration of Ordinance No. 87-235, for the Purpose of Amending the Metro Code Section 4.01.060 Revising Admission Fees and Policies at the Washington Park Zoo

The Clerk read the ordinance by title only a first time. Presiding Officer Waker explained contrary to what had been previously reported to Councilors, an ordinance adopted in 1985 had already amended the "Youth" fee category to an age range of 3 to 11 years. Ordinance No. 87-235 would not amend that age category.

Kay Rich, Acting Zoo Director, reported in January 1984, the Council adopted Resolution No. 84-444 which established financial principles and policies for the District. Those policies specified a ratio of approximately 50 percent tax and 50 percent non-tax revenues be maintained for funding Zoo operations and that the Council review admission fees annually to assist in meeting that policy. Any operating fund surplus would be periodically transferred to the Capital Improvement Fund to implement the Zoo's Master Plan, he explained. Possible improvement projects could include upgrading utilities, building an incubation facility for the Zoo's expanding bird collection, building an off-exhibit breeding facility for endangered species, building storage facilities and providing funds for projects included in the Master Plan but for which no money had been budgeted.

Mr. Rich further explained the ordinance would increase admission rates, would simplify the group discount policy, would provide for special admission rates for special events, would provide for a reduced admission for catered events, and would allow for corporate sponsored free days. Staff recommended the new admission fees and policies be effective January 1, 1988, which would require the ordinance to be adopted under the Council's emergency provisions.

Councilor Kirkpatrick requested the ordinance be reviewed by the Zoo Planning Committee before its December 22 second reading. Presiding

Officer Waker then referred the Ordinance to the Zoo Planning Committee for review and recommendation. He asked the Committee to address questions raised in a memo dated December 9, 1987, from Don Carlson, Council Administrator.

Motion: Councilor Kirkpatrick moved, seconded by Councilor DeJardin, to adopt Ordinance No. 87-235.

Presiding Officer Waker opened the public hearing. There being no testimony, he closed the hearing.

Councilor Hansen asked the Zoo Planning Committee to investigate the possibility of lost admission revenues due to possible lower attendance as a result of a fee increase.

Councilor Kelley requested the Committee to review overhead increases at the Zoo.

Presiding Officer Waker announced the Council would consider adoption of the ordinance at its second reading on December 22, 1987.

6. Consideration of Design Development for the Oregon Convention Center

Tuck Wilson, Convention Center Project Director, introduced Tom Walsh, Chair of the Advisory Committee on Design and Construction for the Oregon Convention Center. Councilors were requested to approve the design development outlined in the document entitled "Design Development: The Oregon Convention Center," prepared by Zimmer Gunsul Frasca/DMJM, and dated December 7, 1987.

Councilor Gardner noted the City of Portland's Transportation Department had submitted to Metro an extensive list of improvements that needed to be made near the construction site. He asked Mr. Wilson how negotiations were proceeding. Mr. Wilson and the Presiding Officer responded that staff was working with the City to narrow down the list of improvements to items directly related to the Oregon Convention Center and for which Metro had budgeted funds.

Councilor Ragsdale reported the Council Convention Center Committee had unanimously endorsed the design development for the Convention Center.

Motion: Councilor Ragsdale moved, seconded by Councilor Gardner, to approve the Design Development for the Oregon Convention Center.

In response to Councilor Collier's question, Mr. Wilson reported staff had discussed provisions for recycling at the Convention Center with Dan Satlzman.



**METRO**

2000 S.W. First Avenue  
Portland, OR 97201-5398  
503/221-1646

# Memorandum

Date: December 21, 1987

To: Metro Council

From: Councilor Kirkpatrick *CK*  
Chair, Zoo Planning Committee

Regarding: COMMITTEE REPORT ON AGENDA ITEM NO. 8.1  
(DECEMBER 22, 1987 COUNCIL MEETING)

ORDINANCE NO. 87-235, FOR THE PURPOSE OF AMENDING THE METRO CODE TO REVISE ADMISSION FEES AND POLICIES AT THE WASHINGTON PARK ZOO

The Zoo Planning Committee unanimously recommends adoption of Ordinance No. 87-235A which is attached as Exhibit A.

The Committee met on December 18, 1987, to consider Ordinance No. 87-235 as introduced by the administration and referred to the Committee by the Council at its meeting on December 12, 1987.

The Committee considered three items in its deliberations: 1) the need for the fee increase; 2) the changes in admission fee policy; and 3) the use of an emergency clause.

## Item 1. Need for the Fee Increase

The Committee heard from the Council staff regarding the memo dated December 9, 1987 (attached as Exhibit B), questioning the need for an increase. Council staff added Table II which shows the actual year to date non-tax revenue as a percent of Operating & Maintenance costs.

The Committee then heard from Kay Rich, Acting Zoo Director, who presented revised Operating Fund revenue and expenditure projections and Capital Fund projections through the current tax levy period (FY 89-90). This information is attached as Exhibit C. Based on the revised projections, the ratio of non-tax revenue as a percent of operating costs could fall to approximately 48.7 percent next fiscal year even with the proposed fee increase. This is based on a conservative attendance projection of 845,000 (45,000) below the current year revised estimate. Mr. Rich points out it is prudent to project this conservative estimate because: 1) weather patterns are likely to return to normal; 2) reconstruction of the freeway ramp will take place causing difficulty in visiting the Zoo; and 3) no major new exhibits are scheduled for opening. Mr. Rich pointed out the fee increase was justified:



1. to maintain, over time, the approximate ratio of 50 percent tax and 50 percent non-tax revenue for funding operations;
2. to provide, if possible, a transfer to the Capital Fund in a sufficient amount to fund unanticipated but expected expenditures related to the Africa Exhibit such as a retaining wall for soil stabilization and a lower perimeter service road for the exhibit;
3. to offset increasing operating costs related to the provision of additional and more complex natural exhibits such as have been and are being built; and to adequately care for the service needs if increasing number of visitors (custodial, grounds, Visitor Services, security, etc.);
4. to assist in paying for increased program offerings -- Birds of Prey, World of Reptiles, Animal Keeper talks and traveling exhibits; and
5. to continue the rehabilitation and maintenance programs now underway to protect the investment already made in the Zoo (roofing, painting, equipment, netting, water and heating systems, etc.).

The Committee agreed with the information provided by the Zoo staff that to maintain the long-term fiscal viability of the Zoo, it is prudent to increase the admission fees.

#### Item 2. Admission Fee Policy Changes

The original ordinance contained two policy changes, one in subsection (e) of the Fee Schedule section, and the other in proposed subsection (f) of the Fee Schedule. The Committee was of the opinion that the current policy of providing special events and concerts, etc., for the price of an admission fee should essentially remain unchanged. The Committee recommendation deletes entirely subsection (f) relating to "After Hour Catered Events" and restores the original code language in subsection (e) and adds a sentence which authorizes the Executive Officer to approve variances to the admission fees (lower or raise such fees) to facilitate the commercial ventures.

#### Item 3. Use of An Emergency Clause

The Committee recommended the fee increase with an emergency clause to make the effective date February 1, 1988. This recommendation was subject to advice from General Counsel that an emergency clause was appropriate. Based on advice from General Counsel that the emergency clause is appropriate in this situation only if there is a financial emergency, Ordinance No. 87-235A does not contain an emergency clause.

Memorandum  
December 21, 1987  
Page 3

The reason that the Committee originally suggested an emergency clause was to avoid confusion and inconvenience to the public when marketing group visitations such as groups of school children. The Committee did not perceive the existence of a financial emergency.

Based on the statute ORS 268.515(7), Ordinance No. 87-235A will be effective on March 23, 1988. This is 65 working days from December 22, 1987, and includes the five-day veto period which runs concurrently with the 65 working day period. To ease the administration of the fee schedule change, Ordinance No. 87-235A makes the fee increase effective on April 1, 1988.

DEC/sm  
8715C/D4

Attachments

BEFORE THE COUNCIL OF THE  
METROPOLITAN SERVICE DISTRICT

FOR THE PURPOSES OF AMENDING	)	ORDINANCE NO. 87-235A
METRO CODE SECTION 4.01.060	)	
REVISING ADMISSION FEES AND	)	
POLICIES AT THE WASHINGTON PARK	)	
ZOO	)	

THE COUNCIL OF THE METROPOLITAN SERVICE DISTRICT HEREBY ORDAINS:

1. That the Washington Park Zoo Admission Fees and Policies, incorporated in Metro Code Section 4.01.060(a) is amended to read:

4.01.060 Admission Fees and Policies:

(a) Regular Fees.

(1) Definitions:

(A) "School Group" is defined as a group of five or more students of a state accredited school elementary, middle, junior and senior high schools or [licensed] registered pre-school/daycare center including at least one chaperone for every five students of high school age or under. Registration for a specified visit date at least [one day] two weeks in advance is required in order for a school group to qualify [as a] for the school group rate.

(B) "Group Other Than School Group" is defined as any group, other than a school group, of [15] twenty-five (25) or more members who have purchased tickets at least one day in advance. All advance tickets shall bear an expiration date not to exceed six (6) months from the date of issuance.

(2) Fee Schedule:

Adult (12 years and over)	[\$2.50]	\$3.00
Youth (3 years through 11 years)	[\$1.25]	\$1.50
Child (2 years and under [3 years])		free
Senior Citizen (65 years and over)	[\$1.25]	\$1.50
School Groups (per student)	[\$ .75]	\$1.00
Chaperones accompanying school groups	[free]	\$1.00
Groups other than school groups		
[15 to 49 per group		10% discount]
[50 to 99 per group		15% discount]
[100] <u>25</u> or more per group		20% discount



Metro Code Section 4.01.060(e) is amended to read:

(e) Commercial Ventures: Proposed commercial or fund-raising ventures with private profit or nonprofit corporations involving admission to the Zoo must be authorized in advance by the Executive Officer. The Executive Officer may approve variances to the admission fees to facilitate such ventures. (Ordinance No. 81-108, Sec. 2; amended by Ordinance No. 85-185, Sec. 1)

2. The changes in the Fee Schedule in subsection 1. of this ordinance shall be effective on April 1, 1988.

ADOPTED by the Council of the Metropolitan Service District  
this \_\_\_\_\_ day of \_\_\_\_\_, 1987.

\_\_\_\_\_  
Richard Waker, Presiding Officer

DEC/sm  
8716C/525  
12/21/87



**METRO**

2000 S.W. First Avenue  
Portland, OR 97201-5398  
503/221-1646

# Memorandum

EXHIBIT B

Date: December 9, 1987  
To: Metro Council  
From: Donald E. Carlson, Council Administrator  
Regarding: COUNCIL MEETING, DECEMBER 10, 1987  
AGENDA ITEM 8.1

CONSIDERATION OF ORDINANCE NO. 87-235 FOR THE PURPOSE OF  
REVISING ADMISSION FEES AND POLICIES

The purpose of this memo is to provide information on Ordinance No. 87-235 which proposes to increase admission fees at the Zoo and change policies regarding charges for special events and after-hour catered events. This memo covers three things: (1) need for the admission increase, (2) the change in the policies, and (3) the proposed effective date of the ordinance (January 1, 1988).

1. NEED FOR FEE INCREASE

The staff report states "fee increase is necessary to maintain the 50 percent non-tax operating revenue goal established for the Zoo." The report shows the projected non-tax revenues as a percent of the operation and maintenance costs for 1987-88 through 1990-91. This information was taken from the Zoo's Five-Year Financial Plan. Based on historical information there is a question about the need to raise admission fees to meet the Council's policy of maintaining:

"A ratio of approximately 50 percent tax and  
50 percent non-tax revenues...for funding zoo  
operations."

Table I attached shows the actual O&M costs, the non-tax revenue and the revenue as a percent of O&M costs. It shows that for fiscal years 1984-85 through 1986-87 the percentage has been maintained above the 50 percent mark. During this period of time the last admission fee increase took place (February 1985). Table I also shows the actual attendance for the years in question, major non-tax sources of revenue (admissions, concessions, railroad rides and all other) and the source of revenue as a percent of operating costs. It shows the impact of attendance on non-tax revenue. The 5 percent increase in non-tax revenue between 1985-86 and 1986-87 is largely attributable to the increase in attendance which caused admission and railroad ride revenue and, particularly, concession revenue to increase.

It should be pointed out that annually in the budget process operating fund surpluses have been transferred to the Capital fund to be used to implement the Master Plan. This practice has been in accord with the Council's adopted policy and presumably would continue. In summary, historical information shows that the current rate structure has been sufficient to meet the policy. The significant increase in non-tax revenue is attributable to the substantial increase in attendance last year. Can that attendance be maintained or was it merely because of good weather and the special events such as the Golden Monkey exhibit?

## 2. POLICY CHANGES

The proposed ordinance suggests changes in policy or practices regarding use of Zoo facilities and services. The current practice is require admission fees to be paid for all special events such as the concerts and company picnics. The philosophy has been to use these events or services to increase attendance at the Zoo. The proposed changes appear to move toward using Zoo facilities to achieve other objectives such as holding a special event or catering a picnic or dinner. This appears to be a subtle difference, but it could be a significant one since it can move the Zoo, which is a tax supported institution, into competition with private institutions offering similar services or other public facilities that may hold concerts. It should be noted that in the past when the Zoo started marketing company picnics as a way to increase attendance a call was received by staff from an owner of a private park complaining about the Zoo taking away business. The proposed changes in the ordinance move the Zoo more in the direction of providing non-Zoo services.

## 3. EFFECTIVE DATE OF ORDINANCE

The staff report suggests a January 1, 1988, effective date for the fee increase. Based on past practice, an emergency clause must be included in the ordinance for the January 1, 1988, effective date. (General Counsel has advised that the statutory requirement below may apply only to solid waste rates.) ORS 268.515(7) states that:

"Except in an emergency, the imposition of or increase in a service or user charge shall not become effective until 65 business days after approval by the governing body. As used in this subsection, business days mean Monday through Friday."

Without the emergency clause the fee increase would be effective on March 29, 1988 (includes five working days for veto period), assuming adoption on December 22, 1988. Pursuant to Metro



December 9, 1987

Page 3

Code Section 2.01.070(g) and ORS 198.550(3) a unanimous vote by Councilors in attendance is required to adopt an ordinance with an emergency clause.

DEC/gl

8648C/529

Attachment

cc: Rena Cusma  
Dan Cooper  
Kay Rich

TABLE I  
 ACTUAL NON-TAX ZOO REVENUE AS  
 A PERCENT OF OPERATIONS & MAINTENANCE COSTS

<u>Item</u>	<u>Fiscal Years</u>		
	<u>1984-85</u>	<u>1985-86</u>	<u>1986-87</u>
Attendance	814,548	794,578	977,959
O & M Costs <sup>a</sup>	\$5,412,175	\$6,079,969	\$6,675,776
All Non-Tax Revenues <sup>b</sup>	2,943,814	3,110,728	3,798,480
Percent of O & M Costs	54%	52%	57%
Admissions	1,202,204	1,325,206	1,537,806
Percent of O & M Costs	22%	22%	23%
Concessions <sup>c</sup>	1,157,316	1,181,195	1,627,274
Percent of O & M Costs	21%	19%	24%
Railroad Rides	222,732	249,483	321,202
Percent of O & M Costs	4%	4%	5%
All Other Non-Tax	361,562	354,844	312,198
Percent of O & M Costs	7%	6%	5%

<sup>a</sup> Includes Personal Services, Materials & Services, Capital Outlay, Insurance, Building and General Fund Transfers.

<sup>b</sup> Includes all non-property tax revenues except fund balance.

<sup>c</sup> Includes food and Gift Shop sales.

8648C/529

TABLE II

ACTUAL YEAR TO DATE NON-TAX REVENUE AS A  
 PERCENT OF OPERATIONS AND MAINTENANCE COSTS  
 (through November 30, 1987)

	<u>Budget</u>	<u>Year to Date 11/30/87</u>	<u>Balance Remaining</u>	<u>Percent Remaining</u>
Attendance	820,000	451,162	368,838	45%
O & M Costs	\$7,497,123 <sup>a</sup>	\$3,393,422 <sup>b</sup>	\$4,103,701	55%
All Non-Tax Revenue	3,597,520	2,067,150	1,530,370	43%
Percent of O & M Costs	48%	61%	37%	

---

<sup>a</sup> Includes Personal Services, Materials & Services, Capital Outlay, Insurance and General Fund Transfers and Contingency.

<sup>b</sup> Include all items in <sup>a</sup> above including the full year of Insurance and General Fund Transfers. Does not include the Contingency.

8648C/529

TABLE 1: OPERATING FUND REQUIREMENTS- FY 87-88 - 89-90

PROJECTED ATTENDANCE	890,000	845,000	919,000
	87-88 Rev. Budget Est	88-89 Projected	89-90 Projected
<b>OPERATING DIVISIONS</b>			
Administration			
Personal Serv.	283,088	345,391	359,207
Materials & Serv.	152,009	226,497	241,557
Capital Outlay	27,594	10,500	10,920
Sub-Total	462,691	582,388	611,684
Animal Management			
Personal Serv.	1,214,794	1,323,079	1,410,253
Materials & Serv.	214,900	380,817	256,919
Capital Outlay	14,300	19,252	17,773
Sub-Total	1,443,994	1,723,148	1,684,945
Facilities Management			
Personal Serv.	982,483	1,039,782	1,111,504
Materials & Serv.	898,737	1,048,777	1,089,497
Capital Outlay	381,156	429,755	405,345
Sub-Total	2,262,376	2,518,314	2,606,346
Education			
Personal Serv.	426,065	463,078	488,648
Materials & Serv.	93,347	102,833	106,946
Capital Outlay	11,400	22,000	10,000
Sub-Total	530,812	587,911	605,594
Marketing			
Personal Serv.	107,003	111,790	117,679
Materials & Serv.	145,955	146,600	152,464
Capital Outlay	6,750	2,704	3,037
Sub-Total	259,708	261,094	273,180
Visitor Services			
Personal Serv.	765,000	805,200	880,000
Materials & Serv.	677,695	670,000	765,000
Capital Outlay	28,720	78,000	48,000
Sub-Total	1,471,415	1,553,200	1,693,000
Total All Divisions	6,430,996	7,226,055	7,474,748
<b>OPERATING TRANSFERS</b>			
General Fund	602,837	639,069	664,632
Insurance	272,978	283,897	295,253
Sub-Total	875,815	922,966	959,885
CONTINGENCY	252,685	233,585	247,371
Sub-Total	1,128,500	1,156,551	1,207,256
UNAPPROPRIATED BALANCE	1,504,228	859,280	613,266
TRANSFER TO CAPITAL FUND	2,219,549	1,987,662	1,820,682
Total Expenditures	11,283,273	11,229,548	11,115,953
<b>SUMMARY:</b>			
Personal Serv.	3,778,433	4,088,320	4,367,290
Materials & Serv.	2,182,643	2,575,524	2,612,383
Capital Outlay	469,920	562,211	495,075
Transfer to Support Serv.	602,837	639,069	664,632
Transfer to Insurance	272,978	283,897	295,253
TOTAL OPERATING EXPENSE	7,306,811	8,149,021	8,434,633

PROJECTED ATTENDANCE	Levy Years		
	87-88	88-89	89-90
	890,000	845,000	919,000
REVENUE PROJECTIONS	Rev. Budget Est	Projected	Projected
Fund Balance	1,846,819	1,756,913	1,092,865
Taxes Current	5,005,000	5,005,000	5,005,000
Taxes Prior Year	495,000	500,000	500,000
ENTERPRISE REVENUES			
Admissions	1,618,142	1,674,204	1,963,646
Food Service/Vending	1,263,800	1,259,050	1,415,260
Gift Shop	382,700	376,420	434,843
Railroad	356,000	338,000	367,600
Rentals	17,800	16,900	18,380
Sale of Animals	15,000	10,000	10,000
Education Fees	68,750	78,000	86,250
Miscellaneous	52,000	54,080	56,243
SUB-TOTAL ENT. REV.	3,774,192	3,806,654	4,352,222
Interest Income	84,262	77,852	79,836
Zoo Parents	33,800	37,856	39,370
Donations	15,200	16,273	17,660
Grants	25,000	25,000	25,000
Sale of Equipment	4,000	4,000	4,000
SUB-TOTAL	162,262	160,981	165,866
TOTAL REVENUE	11,283,273	11,229,548	11,115,953
Non-tax Revenue as % of O&M	53.87%	48.69%	53.57%

TABLE III: CAPITAL IMPROVEMENT FUND REQUIREMENTS AND RESOURCES  
FY 87-88 - FY 89-90

EXPENDITURES	87-88	88-89	89-90
Alaska tundra	\$30,000	\$5,000	
Elephant Museum	\$3,500		
Electrical upgrade			\$500,000
Misc. Impr. & Exhibit dev	\$115,000	\$115,000	\$115,000
Africa bush I & II	\$5,250,000	\$1,870,000	
Education/Admin. Center	\$909,502		
Africa Bush III	\$80,000	\$1,900,000	\$1,759,550
East Bear Grotto			\$700,000
Contingency		\$500,000	\$300,000
Construction Manager	\$53,439	\$55,577	\$57,800
TOTAL	\$6,441,441	\$4,445,577	\$3,432,350
Unappropriated balance	\$3,965,343	\$2,055,695	\$621,812
TOTAL EXPENDITURES	\$10,406,784	\$6,501,272	\$4,054,162
REVENUES			
Beginning Fund Balance	\$7,362,624	\$3,965,343	\$2,055,695
Donations/Bequests	\$356,272	\$350,000	\$75,000
Interest	\$468,339	\$198,267	\$102,785
Transfer - Operating Fund	\$2,219,549	\$1,987,662	\$1,820,682
TOTAL REVENUES	\$10,406,784	\$6,501,272	\$4,054,162





**METRO**

2000 S.W. First Avenue  
Portland, OR 97201-5398  
503/221-1646

# Memorandum

Date: December 9, 1987  
To: Metro Council  
From: Donald E. Carlson, Council Administrator  
Regarding: COUNCIL MEETING, DECEMBER 10, 1987  
AGENDA ITEM 8.1

**CONSIDERATION OF ORDINANCE NO. 87-235 FOR THE PURPOSE OF  
REVISING ADMISSION FEES AND POLICIES**

The purpose of this memo is to provide information on Ordinance No. 87-235 which proposes to increase admission fees at the Zoo and change policies regarding charges for special events and after-hour catered events. This memo covers three things: (1) need for the admission increase, (2) the change in the policies, and (3) the proposed effective date of the ordinance (January 1, 1988).

**1. NEED FOR FEE INCREASE**

The staff report states "fee increase is necessary to maintain the 50 percent non-tax operating revenue goal established for the Zoo." The report shows the projected non-tax revenues as a percent of the operation and maintenance costs for 1987-88 through 1990-91. This information was taken from the Zoo's Five-Year Financial Plan. Based on historical information there is a question about the need to raise admission fees to meet the Council's policy of maintaining:

"A ratio of approximately 50 percent tax and 50 percent non-tax revenues...for funding zoo operations."

Table I attached shows the actual O&M costs, the non-tax revenue and the revenue as a percent of O&M costs. It shows that for fiscal years 1984-85 through 1986-87 the percentage has been maintained above the 50 percent mark. During this period of time the last admission fee increase took place (February 1985). Table I also shows the actual attendance for the years in question, major non-tax sources of revenue (admissions, concessions, railroad rides and all other) and the source of revenue as a percent of operating costs. It shows the impact of attendance on non-tax revenue. The 5 percent increase in non-tax revenue between 1985-86 and 1986-87 is largely attributable to the increase in attendance which caused admission and railroad ride revenue and, particularly, concession revenue to increase.

It should be pointed out that annually in the budget process operating fund surpluses have been transferred to the Capital fund to be used to implement the Master Plan. This practice has been in accord with the Council's adopted policy and presumably would continue. In summary, historical information shows that the current rate structure has been sufficient to meet the policy. The significant increase in non-tax revenue is attributable to the substantial increase in attendance last year. Can that attendance be maintained or was it merely because of good weather and the special events such as the Golden Monkey exhibit?

## 2. POLICY CHANGES

The proposed ordinance suggests changes in policy or practices regarding use of Zoo facilities and services. The current practice is require admission fees to be paid for all special events such as the concerts and company picnics. The philosophy has been to use these events or services to increase attendance at the Zoo. The proposed changes appear to move toward using Zoo facilities to achieve other objectives such as holding a special event or catering a picnic or dinner. This appears to be a subtle difference, but it could be a significant one since it can move the Zoo, which is a tax supported institution, into competition with private institutions offering similar services or other public facilities that may hold concerts. It should be noted that in the past when the Zoo started marketing company picnics as a way to increase attendance a call was received by staff from an owner of a private park complaining about the Zoo taking away business. The proposed changes in the ordinance move the Zoo more in the direction of providing non-Zoo services.

## 3. EFFECTIVE DATE OF ORDINANCE

The staff report suggests a January 1, 1988, effective date for the fee increase. Based on past practice, an emergency clause must be included in the ordinance for the January 1, 1988, effective date. (General Counsel has advised that the statutory requirement below may apply only to solid waste rates.) ORS 268.515(7) states that:

"Except in an emergency, the imposition of or increase in a service or user charge shall not become effective until 65 business days after approval by the governing body. As used in this subsection, business days mean Monday through Friday."

Without the emergency clause the fee increase would be effective on March 29, 1988 (includes five working days for veto period), assuming adoption on December 22, 1988. Pursuant to Metro

December 9, 1987  
Page 3

Code Section 2.01.070(g) and ORS 198.550(3) a unanimous vote by Councilors in attendance is required to adopt an ordinance with an emergency clause.

DEC/gl  
8648C/529

Attachment

cc: Rena Cusma  
Dan Cooper  
Kay Rich

TABLE I  
 ACTUAL NON-TAX ZOO REVENUE AS  
 A PERCENT OF OPERATIONS & MAINTENANCE COSTS

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a Includes Personal Services, Materials & Services, Capital Outlay, Insurance, Building and General Fund Transfers.

b Includes all non-property tax revenues except fund balance.

c Includes food and Gift Shop sales.

8648C/529



**METRO**

2000 S.W. First Avenue  
Portland, OR 97201-5398  
503/221-1646

# Memorandum

Date: December 21, 1987

To: Metro Council

From: Councilor Kirkpatrick *CK*  
Chair, Zoo Planning Committee

Regarding: COMMITTEE REPORT ON AGENDA ITEM NO. 8.1  
(DECEMBER 22, 1987 COUNCIL MEETING)

ORDINANCE NO. 87-235, FOR THE PURPOSE OF AMENDING THE METRO CODE TO REVISE ADMISSION FEES AND POLICIES AT THE WASHINGTON PARK ZOO

The Zoo Planning Committee unanimously recommends adoption of Ordinance No. 87-235A which is attached as Exhibit A.

The Committee met on December 18, 1987, to consider Ordinance No. 87-235 as introduced by the administration and referred to the Committee by the Council at its meeting on December 12, 1987.

The Committee considered three items in its deliberations: 1) the need for the fee increase; 2) the changes in admission fee policy; and 3) the use of an emergency clause.

#### Item 1. Need for the Fee Increase

The Committee heard from the Council staff regarding the memo dated December 9, 1987 (attached as Exhibit B), questioning the need for an increase. Council staff added Table II which shows the actual year to date non-tax revenue as a percent of Operating & Maintenance costs.

The Committee then heard from Kay Rich, Acting Zoo Director, who presented revised Operating Fund revenue and expenditure projections and Capital Fund projections through the current tax levy period (FY 89-90). This information is attached as Exhibit C. Based on the revised projections, the ratio of non-tax revenue as a percent of operating costs could fall to approximately 48.7 percent next fiscal year even with the proposed fee increase. This is based on a conservative attendance projection of 845,000 (45,000) below the current year revised estimate. Mr. Rich points out it is prudent to project this conservative estimate because: 1) weather patterns are likely to return to normal; 2) reconstruction of the freeway ramp will take place causing difficulty in visiting the Zoo; and 3) no major new exhibits are scheduled for opening. Mr. Rich pointed out the fee increase was justified:

1. to maintain, over time, the approximate ratio of 50 percent tax and 50 percent non-tax revenue for funding operations;
2. to provide, if possible, a transfer to the Capital Fund in a sufficient amount to fund unanticipated but expected expenditures related to the Africa Exhibit such as a retaining wall for soil stabilization and a lower perimeter service road for the exhibit;
3. to offset increasing operating costs related to the provision of additional and more complex natural exhibits such as have been and are being built; and to adequately care for the service needs if increasing number of visitors (custodial, grounds, Visitor Services, security, etc.);
4. to assist in paying for increased program offerings -- Birds of Prey, World of Reptiles, Aminimal Keeper talks and traveling exhibits; and
5. to continue the rehabilitation and maintenance programs now underway to protect the investment already made in the Zoo (roofing, painting, equipment, netting, water and heating systems, etc.).

The Committee agreed with the information provided by the Zoo staff that to maintain the long-term fiscal viability of the Zoo, it is prudent to increase the admission fees.

#### Item 2. Admission Fee Policy Changes

The original ordinance contained two policy changes, one in subsection (e) of the Fee Schedule section, and the other in proposed subsection (f) of the Fee Schedule. The Committee was of the opinion that the current policy of providing special events and concerts, etc., for the price of an admission fee should essentially remain unchanged. The Committee recommendation deletes entirely subsection (f) relating to "After Hour Catered Events" and restores the original code language in subsection (e) and adds a sentence which authorizes the Executive Officer to approve variances to the admission fees (lower or raise such fees) to facilitate the commercial ventures.

#### Item 3. Use of An Emergency Clause

The Committee recommended the fee increase with an emergency clause to make the effective date February 1, 1988. This recommendation was subject to advice from General Counsel that an emergency clause was appropriate. Based on advice from General Counsel that the emergency clause is appropriate in this situation only if there is a financial emergency, Ordinance No. 87-235A does not contain an emergency clause.

Memorandum  
December 21, 1987  
Page 3

The reason that the Committee originally suggested an emergency clause was to avoid confusion and inconvenience to the public when marketing group visitations such as groups of school children. The Committee did not perceive the existence of a financial emergency.

Based on the statute ORS 268.515(7), Ordinance No. 87-235A will be effective on March 23, 1988. This is 65 working days from December 22, 1987, and includes the five-day veto period which runs concurrently with the 65 working day period. To ease the administration of the fee schedule change, Ordinance No. 87-235A makes the fee increase effective on April 1, 1988.

DEC/sm  
8715C/D4

Attachments

BEFORE THE COUNCIL OF THE  
METROPOLITAN SERVICE DISTRICT

FOR THE PURPOSES OF AMENDING )  
METRO CODE SECTION 4.01.060 )  
REVISING ADMISSION FEES AND )  
POLICIES AT THE WASHINGTON PARK )  
ZOO )  
ORDINANCE NO. 87-235A

THE COUNCIL OF THE METROPOLITAN SERVICE DISTRICT HEREBY ORDAINS:

1. That the Washington Park Zoo Admission Fees and Policies, incorporated in Metro Code Section 4.01.060(a) is amended to read:

4.01.060 Admission Fees and Policies:

(a) Regular Fees.

(1) Definitions:

(A) "School Group" is defined as a group of five or more students of a state accredited school elementary, middle, junior and senior high schools or [licensed] registered pre-school/daycare center including at least one chaperone for every five students of high school age or under. Registration for a specified visit date at least [one day] two weeks in advance is required in order for a school group to qualify [as a] for the school group rate.

(B) "Group Other Than School Group" is defined as any group, other than a school group, of [15] twenty-five (25) or more members who have purchased tickets at least one day in advance. All advance tickets shall bear an expiration date not to exceed six (6) months from the date of issuance.

(2) Fee Schedule:

Adult (12 years and over)	[\$2.50]	\$3.00
Youth (3 years through 11 years)	[\$1.25]	\$1.50
Child ( <u>2 years and under [3 years]</u> )		free
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School Groups (per student)	[\$ .75]	\$1.00
Chaperones accompanying school groups	[free]	\$1.00
Groups other than school groups		
[15 to 49 per group		10% discount]
[50 to 99 per group		15% discount]
[100] <u>25</u> or more per group		20% discount



Metro Code Section 4.01.060(e) is amended to read:

(e) Commercial Ventures: Proposed commercial or fund-raising ventures with private profit or nonprofit corporations involving admission to the Zoo must be authorized in advance by the Executive Officer. The Executive Officer may approve variances to the admission fees to facilitate such ventures. (Ordinance No. 81-108, Sec. 2; amended by Ordinance No. 85-185, Sec. 1)

2. The changes in the Fee Schedule in subsection 1. of this ordinance shall be effective on April 1, 1988.

ADOPTED by the Council of the Metropolitan Service District  
this \_\_\_\_\_ day of \_\_\_\_\_, 1987.

Richard Waker, Presiding Officer

DEC/sm  
8716C/525  
12/21/87



**METRO**

2000 S.W. First Avenue  
Portland, OR 97201-5398  
503/221-1646

# Memorandum

EXHIBIT B

Date: December 9, 1987  
To: Metro Council  
From: Donald E. Carlson, Council Administrator *DEC*  
Regarding: COUNCIL MEETING, DECEMBER 10, 1987  
AGENDA ITEM 8.1

CONSIDERATION OF ORDINANCE NO. 87-235 FOR THE PURPOSE OF  
REVISING ADMISSION FEES AND POLICIES

The purpose of this memo is to provide information on Ordinance No. 87-235 which proposes to increase admission fees at the Zoo and change policies regarding charges for special events and after-hour catered events. This memo covers three things: (1) need for the admission increase, (2) the change in the policies, and (3) the proposed effective date of the ordinance (January 1, 1988).

1. NEED FOR FEE INCREASE

The staff report states "fee increase is necessary to maintain the 50 percent non-tax operating revenue goal established for the Zoo." The report shows the projected non-tax revenues as a percent of the operation and maintenance costs for 1987-88 through 1990-91. This information was taken from the Zoo's Five-Year Financial Plan. Based on historical information there is a question about the need to raise admission fees to meet the Council's policy of maintaining:

"A ratio of approximately 50 percent tax and 50 percent non-tax revenues...for funding zoo operations."

Table I attached shows the actual O&M costs, the non-tax revenue and the revenue as a percent of O&M costs. It shows that for fiscal years 1984-85 through 1986-87 the percentage has been maintained above the 50 percent mark. During this period of time the last admission fee increase took place (February 1985). Table I also shows the actual attendance for the years in question, major non-tax sources of revenue (admissions, concessions, railroad rides and all other) and the source of revenue as a percent of operating costs. It shows the impact of attendance on non-tax revenue. The 5 percent increase in non-tax revenue between 1985-86 and 1986-87 is largely attributable to the increase in attendance which caused admission and railroad ride revenue and, particularly, concession revenue to increase.

December 9, 1987

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It should be pointed out that annually in the budget process operating fund surpluses have been transferred to the Capital fund to be used to implement the Master Plan. This practice has been in accord with the Council's adopted policy and presumably would continue. In summary, historical information shows that the current rate structure has been sufficient to meet the policy. The significant increase in non-tax revenue is attributable to the substantial increase in attendance last year. Can that attendance be maintained or was it merely because of good weather and the special events such as the Golden Monkey exhibit?

## 2. POLICY CHANGES

The proposed ordinance suggests changes in policy or practices regarding use of Zoo facilities and services. The current practice is require admission fees to be paid for all special events such as the concerts and company picnics. The philosophy has been to use these events or services to increase attendance at the Zoo. The proposed changes appear to move toward using Zoo facilities to achieve other objectives such as holding a special event or catering a picnic or dinner. This appears to be a subtle difference, but it could be a significant one since it can move the Zoo, which is a tax supported institution, into competition with private institutions offering similar services or other public facilities that may hold concerts. It should be noted that in the past when the Zoo started marketing company picnics as a way to increase attendance a call was received by staff from an owner of a private park complaining about the Zoo taking away business. The proposed changes in the ordinance move the Zoo more in the direction of providing non-Zoo services.

## 3. EFFECTIVE DATE OF ORDINANCE

The staff report suggests a January 1, 1988, effective date for the fee increase. Based on past practice, an emergency clause must be included in the ordinance for the January 1, 1988, effective date. (General Counsel has advised that the statutory requirement below may apply only to solid waste rates.) ORS 268.515(7) states that:

"Except in an emergency, the imposition of or increase in a service or user charge shall not become effective until 65 business days after approval by the governing body. As used in this subsection, business days mean Monday through Friday."

Without the emergency clause the fee increase would be effective on March 29, 1988 (includes five working days for veto period), assuming adoption on December 22, 1988. Pursuant to Metro

December 9, 1987  
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Code Section 2.01.070(g) and ORS 198.550(3) a unanimous vote by Councilors in attendance is required to adopt an ordinance with an emergency clause.

DEC/gl  
8648C/529

Attachment

cc: Rena Cusma  
Dan Cooper  
Kay Rich

TABLE I  
 ACTUAL NON-TAX ZOO REVENUE AS  
 A PERCENT OF OPERATIONS & MAINTENANCE COSTS

<u>Item</u>	<u>Fiscal Years</u>		
	<u>1984-85</u>	<u>1985-86</u>	<u>1986-87</u>
Attendance	814,548	794,578	977,959
O & M Costs <sup>a</sup>	\$5,412,175	\$6,079,969	\$6,675,776
All Non-Tax Revenues <sup>b</sup>	2,943,814	3,110,728	3,798,480
Percent of O & M Costs	54%	52%	57%
Admissions	1,202,204	1,325,206	1,537,806
Percent of O & M Costs	22%	22%	23%
Concessions <sup>c</sup>	1,157,316	1,181,195	1,627,274
Percent of O & M Costs	21%	19%	24%
Railroad Rides	222,732	249,483	321,202
Percent of O & M Costs	4%	4%	5%
All Other Non-Tax	361,562	354,844	312,198
Percent of O & M Costs	7%	6%	5%

<sup>a</sup> Includes Personal Services, Materials & Services, Capital Outlay, Insurance, Building and General Fund Transfers.

<sup>b</sup> Includes all non-property tax revenues except fund balance.

<sup>c</sup> Includes food and Gift Shop sales.

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TABLE II

ACTUAL YEAR TO DATE NON-TAX REVENUE AS A  
 PERCENT OF OPERATIONS AND MAINTENANCE COSTS  
 (through November 30, 1987)

	<u>Budget</u>	<u>Year to Date 11/30/87</u>	<u>Balance Remaining</u>	<u>Percent Remaining</u>
Attendance	820,000	451,162	368,838	45%
O & M Costs	\$7,497,123 <sup>a</sup>	\$3,393,422 <sup>b</sup>	\$4,103,701	55%
All Non-Tax Revenue	3,597,520	2,067,150	1,530,370	43%
Percent of O & M Costs	48%	61%	37%	

<sup>a</sup> Includes Personal Services, Materials & Services, Capital Outlay, Insurance and General Fund Transfers and Contingency.

<sup>b</sup> Include all items in <sup>a</sup> above including the full year of Insurance and General Fund Transfers. Does not include the Contingency.

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EXHIBIT C

TABLE I: OPERATING FUND REQUIREMENTS- FY 87-88 - 89-90

PROJECTED ATTENDANCE	890,000	845,000	919,000
	87-88	88-89	89-90
	Rev. Budget Est	Projected	Projected
<b>OPERATING DIVISIONS</b>			
Administration			
Personal Serv.	283,088	345,391	359,207
Materials & Serv.	152,009	226,497	241,557
Capital Outlay	27,594	10,500	10,920
Sub-Total	462,691	582,388	611,684
Animal Management			
Personal Serv.	1,214,794	1,323,079	1,410,253
Materials & Serv.	214,900	380,817	256,919
Capital Outlay	14,300	19,252	17,773
Sub-Total	1,443,994	1,723,148	1,684,945
Facilities Management			
Personal Serv.	982,483	1,039,782	1,111,504
Materials & Serv.	898,737	1,048,777	1,089,497
Capital Outlay	381,156	429,755	405,345
Sub-Total	2,262,376	2,518,314	2,606,346
Education			
Personal Serv.	426,065	463,078	488,648
Materials & Serv.	93,347	102,833	106,946
Capital Outlay	11,400	22,000	10,000
Sub-Total	530,812	587,911	605,594
Marketing			
Personal Serv.	107,003	111,790	117,679
Materials & Serv.	145,955	146,600	152,464
Capital Outlay	6,750	2,704	3,037
Sub-Total	259,708	261,094	273,180
Visitor Services			
Personal Serv.	765,000	805,200	880,000
Materials & Serv.	677,695	670,000	765,000
Capital Outlay	28,720	78,000	48,000
Sub-Total	1,471,415	1,553,200	1,693,000
Total All Divisions	6,430,996	7,226,055	7,474,748
<b>OPERATING TRANSFERS</b>			
General Fund	602,837	639,069	664,632
Insurance	272,978	283,897	295,253
Sub-Total	875,815	922,966	959,885
CONTINGENCY	252,685	233,585	247,371
Sub-Total	1,128,500	1,156,551	1,207,256
UNAPPROPRIATED BALANCE	1,504,228	859,280	613,266
TRANSFER TO CAPITAL FUND	2,219,549	1,987,662	1,820,682
Total Expenditures	11,283,273	11,229,548	11,115,953
<b>SUMMARY:</b>			
Personal Serv.	3,778,433	4,088,320	4,367,290
Materials & Serv.	2,182,643	2,575,524	2,612,383
Capital Outlay	469,920	562,211	495,075
Transfer to Support Serv.	602,837	639,069	664,632
Transfer to Insurance	272,978	283,897	295,253
TOTAL OPERATING EXPENSE	7,306,811	8,149,021	8,434,633

TABLE II: OPERATING FUND RESOURCES - FY 86-87 - 90-91

PROJECTED ATTENDANCE	Levy Years		
	87-88	88-89	89-90
	890,000	845,000	919,000
REVENUE PROJECTIONS	Rev. Budget Est	Projected	Projected
Fund Balance	1,846,819	1,756,913	1,092,865
Taxes Current	5,005,000	5,005,000	5,005,000
Taxes Prior Year	495,000	500,000	500,000
ENTERPRISE REVENUES			
Admissions	1,618,142	1,674,204	1,963,646
Food Service/Vending	1,263,800	1,259,050	1,415,260
Gift Shop	382,700	376,420	434,843
Railroad	356,000	338,000	367,600
Rentals	17,800	16,900	18,380
Sale of Animals	15,000	10,000	10,000
Education Fees	68,750	78,000	86,250
Miscellaneous	52,000	54,080	56,243
SUB-TOTAL ENT. REV.	3,774,192	3,806,654	4,352,222
Interest Income	84,262	77,852	79,836
Zoo Parents	33,800	37,856	39,370
Donations	15,200	16,273	17,660
Grants	25,000	25,000	25,000
Sale of Equipment	4,000	4,000	4,000
SUB-TOTAL	162,262	160,981	165,866
TOTAL REVENUE	11,283,273	11,229,548	11,115,953
Non-tax Revenue as % of O&M	53.87%	48.69%	53.57%

TABLE III: CAPITAL IMPROVEMENT FUND REQUIREMENTS AND RESOURCES  
FY 87-88 - FY 89-90

	87-88	88-89	89-90
EXPENDITURES			
Alaska tundra	\$30,000	\$5,000	
Elephant Museum	\$3,500		
Electrical upgrade			\$500,000
Misc. Impr. & Exhibit dev	\$115,000	\$115,000	\$115,000
Africa bush I & II	\$5,250,000	\$1,870,000	
Education/Admin. Center	\$909,502		
Africa Bush III	\$80,000	\$1,900,000	\$1,759,550
East Bear Grotto			\$700,000
Contingency		\$500,000	\$300,000
Construction Manager	\$53,439	\$55,577	\$57,800
TOTAL	\$6,441,441	\$4,445,577	\$3,432,350
Unappropriated balance	\$3,965,343	\$2,055,695	\$621,812
TOTAL EXPENDITURES	\$10,406,784	\$6,501,272	\$4,054,162
REVENUES			
Beginning Fund Balance	\$7,362,624	\$3,965,343	\$2,055,695
Donations/Bequests	\$356,272	\$350,000	\$75,000
Interest	\$468,339	\$198,267	\$102,785
Transfer - Operating Fund	\$2,219,549	\$1,987,662	\$1,820,682
TOTAL REVENUES	\$10,406,784	\$6,501,272	\$4,054,162





**METRO**

2000 S.W. First Avenue  
Portland, OR 97201-5398  
503/221-1646

# Memorandum

Date: December 30, 1987

To: Rena Cusma, Executive Officer

From: Marie Nelson, Clerk of the Council *AMN*

Regarding: **TRANSMITTAL OF ORDINANCE NO. 87-235** FOR VETO CONSIDERATION,  
an Ordinance Amending Metro Code Section 4.01.060 Revising  
Admission Fees and Policies at the Washington Park Zoo

Attached for your consideration is a certified true copy  
of Ordinance No. 87-235, adopted by the Council on  
December 22, 1987.

If you wish to veto this ordinance, I must receive a signed and  
dated written veto message from you no later than 5:00 p.m.,  
Wednesday, December 30, 1987. The veto message, if submitted,  
will become part of the permanent record. If no veto message  
is received by the time stated above, the ordinance will be  
considered finally approved.

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I, *Kathleen Oudal*, received this memo and a  
certified true copy of Ordinance No. 87-235 from the Clerk  
of the Council on December 30, 1987.

Signed: *Kathleen Oudal*

Dated: *12/30/87*



# METRO

2000 S.W. First Avenue  
Portland, OR 97201-5398  
503/221-1646

January 4, 1988

Mr. Charles D. Cameron  
County Administrator  
Washington County Courthouse  
150 North First Avenue  
Hillsboro, OR 97123

Dear Mr. Cameron:

Enclosed is a true copy of the following ordinance adopted by the Metro Council. Please file this ordinance in the Metro file maintained by your county.

Ordinance No. 87-235A For the Purpose of Amending Metro Code Section 4.01.060 Revising Admission Fees and Policies at the Washington Park Zoo.

Sincerely,

A. Marie Nelson  
Clerk of the Council

AMN:pa

Enclosure

**Metro Council**

Richard Waker  
Presiding Officer  
District 2

Jim Gardner  
Deputy Presiding  
Officer  
District 3

Mike Ragsdale  
District 1

Corky Kirkpatrick  
District 4

Tom DeJardin  
District 5

George Van Bergen  
District 6

Sharron Kelley  
District 7

Mike Bonner  
District 8

Tanya Collier  
District 9

Larry Cooper  
District 10

David Knowles  
District 11

Gary Hansen  
District 12

Executive Officer  
Rena Cusma



**METRO**

2370 S.W. First Avenue  
Portland, OR 97201-5398  
503/221-1646

January 4, 1988

Ms. Jane McGarvin  
Clerk of the Board  
Multnomah County Courthouse  
1021 S. W. Fourth Avenue  
Portland, OR 97204

Dear Jane:

Enclosed is a true copy of the following ordinance adopted by the Metro Council. Please file this ordinance in the Metro file maintained by your county.

Ordinance No. 87-235A For the Purpose of Amending Metro Code Section 4.01.060 Revising Admission Fees and Policies at the Washington Park Zoo.

Sincerely,

A. Marie Nelson  
Clerk of the Council

AMN:pa

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District 10

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District 11

Gary Hansen  
District 12

Executive Officer  
Rena Cusma



# METRO

2000 S.W. First Avenue  
Portland, OR 97201-5398  
503/221-1646

January 4, 1988

Mr. John Kauffman  
County Clerk  
Clackamas County Courthouse  
8th and Main  
Oregon City, OR 97045

Dear Mr. Kauffman:

Enclosed is a true copy of the following ordinance adopted by the Metro Council. Please file this ordinance in the Metro file maintained by your county.

Ordinance No. 87-235A For the Purpose of Amending Metro Code Section 4.01.060 Revising Admission Fees and Policies at the Washington Park Zoo.

Sincerely,

A. Marie Nelson  
Clerk of the Council

AMN:pa

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Rena Cusma