

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ADOPTING THE ) ANNUAL BUDGET FOR FISCAL YEAR 2003- ) 04, MAKING APPROPRIATIONS, AND ) LEVYING AD VALOREM TAXES, AND ) DECLARING AN EMERGENCY )	ORDINANCE NO. 03-1001B     Introduced by David Bragdon, Council President
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WHEREAS, the Multnomah County Tax Supervising and Conservation Commission held its public hearing on the annual Metro budget for the fiscal year beginning July 1, 2003, and ending June 30, 2004; and

WHEREAS, recommendations from the Multnomah County Tax Supervising and Conservation Commission have been received by Metro (attached as Exhibit A and made a part of the Ordinance) and considered; now, therefore,

THE METRO COUNCIL ORDAINS AS FOLLOWS:

1. The "Fiscal Year 2003-04 Metro Budget," in the total amount of TWO HUNDRED NINETY-THREE MILLION EIGHT HUNDRED FOURTEEN THOUSAND FIVE HUNDRED FIFTEEN (\$293,814,515) DOLLARS, attached hereto as Exhibit B, and the Schedule of Appropriations, attached hereto as Exhibit C, are hereby adopted.

2. The Metro Council does hereby levy ad valorem taxes, as provided in the budget adopted by Section 1 of this Ordinance, at the rate of \$0.0966 per thousand dollars of assessed value for Zoo operations and in the amount of SEVENTEEN MILLION NINE HUNDRED FORTY THOUSAND TWO HUNDRED EIGHTY SEVEN (\$17,940,287) DOLLARS for general obligation bond debt, said taxes to be levied upon taxable properties within the Metro District for the fiscal year 2003-04. The following allocation and categorization subject to the limits of Section 11b, Article XI of the Oregon Constitution constitute the above aggregate levy.

SUMMARY OF AD VALOREM TAX LEVY

	Subject to the General Government <u>Limitation</u>	Excluded from <u>the Limitation</u>
Zoo Tax Rate Levy	\$0.0966/\$1,000	
General Obligation Bond Levy		\$17,940,287

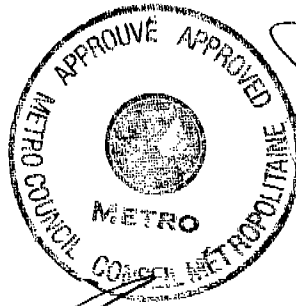
3. The Pioneer Cemetery Perpetual Care Fund is hereby created for the purpose of providing for the long-term maintenance of the cemeteries. Major revenues for the fund shall come from a surcharge on grave sales. In the event of elimination of the fund, any balance remaining in the fund shall revert to any fund designated to care for the maintenance of the cemeteries or, in absence of that, the Regional Parks Operating Fund.

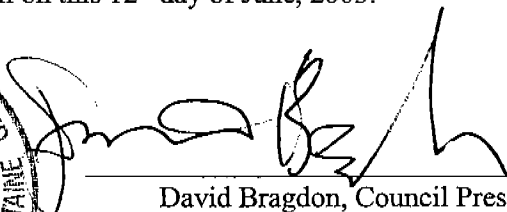
4. In accordance with Section 2.02.040 of the Metro Code, the Metro Council hereby authorizes positions and expenditures in accordance with the Annual Budget adopted by Section 1 of this Ordinance, and hereby appropriates funds for the fiscal year beginning July 1, 2003, from the funds and for the purposes listed in the Schedule of Appropriations, Exhibit C.

5. The Chief Financial Officer shall make the filings as required by ORS 294.555 and ORS 310.060, or as requested by the Assessor's Office of Clackamas, Multnomah, and Washington Counties.

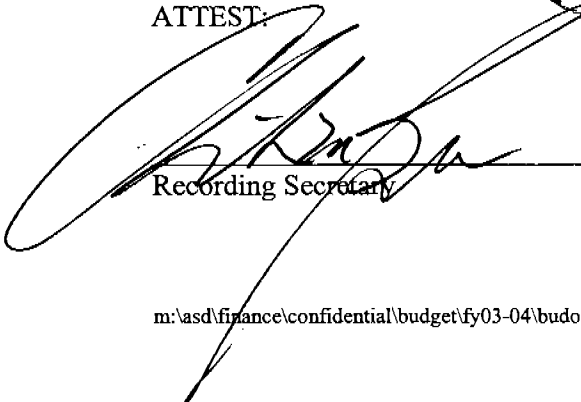
6. This Ordinance being necessary for the health, safety, or welfare of the Metro area, for the reason that the new fiscal year begins July 1, 2003, and Oregon Budget Law requires the adoption of a budget prior to the beginning of the fiscal year, an emergency is declared to exist and the Ordinance takes effect upon passage.

ADOPTED by the Metro Council on this 12<sup>th</sup> day of June, 2003.

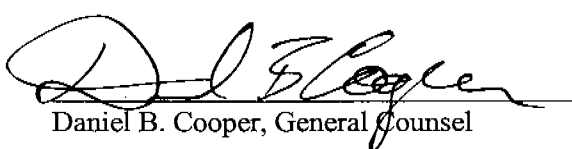


  
David Bragdon, Council President

ATTEST:

  
Recording Secretary

Approved as to Form:

  
Daniel B. Cooper, General Counsel

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**Tax Supervising & Conservation Commission**

PO Box 8428  
Portland, Oregon  
97207-8428

Telephone (503) 988-3054

Fax: (503) 988-3053

E-Mail:  
TSCC@co.multnomah.or.us

Web Site:  
www.co.multnomah.or.us/  
orgs/tsccl

June 5, 2003

Metro Council  
600 NE Grand Avenue  
Portland, Oregon 97232

Dear Councilors:

The Tax Supervising and Conservation Commission met on June 5, 2003 to review, discuss and conduct a public hearing on the Metro 2003-04 budget. This hearing was conducted pursuant to ORS 294.605-705 to confirm compliance with applicable laws and to determine the adequacy of estimates necessary to support efficient and economical administration of the district.

The 2003-04 budget, filed May 8, 2003, is hereby certified by a majority vote of members of the Commission with no objections or recommendations. Estimates were judged to be reasonable for the purpose shown and the document was found to be in substantial compliance with Local Budget Law. The budget estimates and levy amounts, as shown in the approved budget, were as follows:

	<u>Budget Estimates</u>	<u>Unappropriated Portion</u>
General Fund	\$ 11,833,068	\$ 992,942
Building Management Fund	4,343,494	1,629,739
Convention Center Project Capital Fund	1,825,000	0
General Obligation Bond Debt Service Fund	29,353,870	9,805,643
General Revenue Bond Fund	5,775,038	1,950,000
MERC Operating Fund	44,240,905	8,780,494
MERC Pooled Capital Fund	6,007,328	2,414,700
Open Spaces Fund	11,136,057	2,106,419
Pioneer Cemetery Perpetual Care Fund	113,583	113,583
Planning Fund	18,651,717	90,000
Regional Parks Fund	10,246,290	2,698,850
Regional Parks Special Accounts Fund	448,543	354,450
Rehabilitation & Enhancement Fund	2,457,545	1,599,670
Risk Management Fund	12,904,302	4,781,944
Smith & Bybee Lakes Trust Fund	4,985,041	3,591,272
Solid Waste Revenue Fund	82,009,210	15,017,337
Support Services Fund	10,733,081	151,974
Zoo Operating Fund	28,504,549	4,251,237
Zoo Capital Fund	<u>8,232,874</u>	<u>2,893,193</u>
Total Budget Estimates	\$ 293,801,495	\$ 63,223,437

Tax Levy:

Permanent Rate Zoo Operating	\$ 0.0966
Debt Service - Not Subject to Limit	\$ 17,940,287

Please file a complete copy of the adopted budget with the Commission within 15 days of adoption.

We appreciate having the opportunity to discuss this budget with you.

Yours very truly,

TAX SUPERVISING & CONSERVATION COMMISSION

Julie VanNoy, Commissioner

Lynn McNamara, Commissioner

Richard Anderson, Commissioner

Anthony Jankans, Commissioner

Carol Samuels, Commissioner

Commissioners  
Richard Anderson  
Anthony Jankans  
Lynn McNamara  
Carol Samuels  
Julie Van Noy



**Tax Supervising  
& Conservation  
Commission**

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Web Site:  
[www.co.multnomah.or.us/  
orgs/tsccl](http://www.co.multnomah.or.us/orgs/tsccl)

June 5, 2003

Casey Short  
Metro  
600 NE Grand Avenue  
Portland, Oregon 97232

Dear Casey:

The request for an extension of time for filing the 2003-04 Metro adopted budget was received on May 20, 2003. Per your request an extension to July 15, 2003 is granted.

If we can be of further assistance please us let know.

Sincerely,

A handwritten signature in black ink that reads "Linda Burglehaus". The signature is written in a cursive style with a large, looped "L" and "B".

Linda Burglehaus  
Director

**Commissioners**  
Richard Anderson  
Anthony Jankans  
Lynn McNamara  
Carol Samuels  
Julie Van Noy

# Metro Budget



METRO

PEOPLE PLACES  
OPEN SPACES

*Portland, Oregon*

## Adopted Budget Volume 1

PLEASE NOTE: This record  
(Exhibit B) was too large to scan  
in its entirety. To view the  
record, please contact the Metro  
Archivist.

# 2003-04

Exhibit B

# MetroBudget



**METRO**

PEOPLE PLACES  
OPEN SPACES

*Portland, Oregon*

## **Adopted Budget Volume 2**

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# 20003-04

# Schedule of Appropriations

<b>BUILDING MANAGEMENT FUND</b>	
Operating Expenses (PS & M&S)	\$903,059
Capital Outlay	15,000
Interfund Transfers	1,755,696
Contingency	40,000
Unappropriated Balance	1,629,739
<b>Total Fund Requirements</b>	<b>\$4,343,494</b>

<b>CONVENTION CENTER PROJECT CAPITAL FUND</b>	
Operating Expenses (PS & M&S)	\$48,600
Capital Outlay	1,776,400
<b>Total Fund Requirements</b>	<b>\$1,825,000</b>

<b>GENERAL FUND</b>	
Council Office/Public Affairs	
Operating Expenses (PS & M&S)	\$1,996,482
Subtotal	1,996,482
Special Appropriations	
Materials & Services	340,000
Subtotal	340,000
General Expenses	
Interfund Transfers	8,041,194
Contingency	500,000
Subtotal	8,541,194
Unappropriated Balance	692,942
<b>Total Fund Requirements</b>	<b>\$11,570,618</b>

<b>GENERAL OBLIGATION BOND DEBT SERVICE FUND</b>	
Debt Service	\$19,548,227
Unappropriated Balance	9,805,643
<b>Total Fund Requirements</b>	<b>\$29,353,870</b>

<b>GENERAL REVENUE BOND FUND</b>	
Project Account	
Capital Outlay - Washington Park Parking Lot	175,281
Subtotal	175,281

<b>GENERAL REVENUE BOND FUND (continued)</b>	
Debt Service Account	
Debt Service - Metro Regional Center	1,785,696
Debt Service - Expo Center Hall D	1,128,742
Debt Service - Washington Park Parking Lot	435,319
Subtotal	3,349,757

General Expenses	
Contingency	300,000
Subtotal	300,000

Unappropriated Balance	1,950,000
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<b>Total Fund Requirements</b>	<b>\$5,775,038</b>
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<b>MERC OPERATING FUND</b>	
Operating Expenses (PS & M&S)	\$30,520,098
Debt Service	22,809
Interfund Transfers	3,694,943
Contingency	1,222,561
Unappropriated Balance	8,780,494
<b>Total Fund Requirements</b>	<b>\$44,240,905</b>

<b>MERC POOLED CAPITAL FUND</b>	
Operating Expenses (PS & M&S)	\$528,048
Capital Outlay	2,389,580
Contingency	750,000
Unappropriated Balance	2,437,920
<b>Total Fund Requirements</b>	<b>\$6,105,548</b>

<b>OPEN SPACES FUND</b>	
Operating Expenses (PS & M&S)	\$2,633,260
Capital Outlay	5,137,300
Interfund Transfers	1,009,078
Contingency	250,000
Unappropriated Balance	2,106,419
<b>Total Fund Requirements</b>	<b>\$11,136,057</b>

<b>PIONEER CEMETERY PERPETUAL CARE FUND</b>	
Unappropriated Balance	\$113,583
<b>Total Fund Requirements</b>	<b>\$113,583</b>

<b>PLANNING FUND</b>	
Operating Expenses (PS & M&S)	\$15,755,770
Debt Service	44,212
Capital Outlay	54,200
Interfund Transfers	2,437,286
Contingency	369,499
Unappropriated Balance	90,000
<b>Total Fund Requirements</b>	<b>\$18,750,967</b>

<b>REGIONAL PARKS FUND</b>	
Operating Expenses (PS & M&S)	\$5,066,632
Capital Outlay	924,711
Interfund Transfers	1,294,707
Contingency	261,390
Unappropriated Balance	2,698,850
<b>Total Fund Requirements</b>	<b>\$10,246,290</b>

<b>REGIONAL PARKS SPECIAL ACCOUNTS FUND</b>	
Operating Expenses (PS & M&S)	\$100
Interfund Transfers	93,993
Unappropriated Balance	354,450
<b>Total Fund Requirements</b>	<b>\$448,543</b>

<b>REHABILITATION &amp; ENHANCEMENT FUND</b>	
Operating Expenses (PS & M&S)	\$533,952
Interfund Transfers	23,923
Contingency	300,000
Unappropriated Balance	1,599,670
<b>Total Fund Requirements</b>	<b>\$2,457,545</b>

<b>RISK MANAGEMENT FUND</b>	
Operating Expenses (PS & M&S)	\$7,622,358
Contingency	500,000
Unappropriated Balance	4,781,944
<b>Total Fund Requirements</b>	<b>\$12,904,302</b>

<b>SMITH AND BYBEE LAKES FUND</b>	
Operating Expenses (PS & M&S)	\$231,470
Capital Outlay	1,100,070
Interfund Transfers	52,412
Contingency	9,817
Unappropriated Balance	3,591,272
<b>Total Fund Requirements</b>	<b>\$4,985,041</b>

<b>SOLID WASTE REVENUE FUND</b>	
Operating Account	
Operating Expenses (PS & M&S)	\$43,847,707
<b>Subtotal</b>	<b>43,847,707</b>

Debt Service Account	
Debt Service	1,511,427
<b>Subtotal</b>	<b>1,511,427</b>

Landfill Closure Account	
Materials & Services	192,400
Capital Outlay	1,008,200
<b>Subtotal</b>	<b>1,200,600</b>

Renewal and Replacement Account	
Capital Outlay	2,899,000
<b>Subtotal</b>	<b>2,899,000</b>

General Account	
Capital Outlay	915,000
<b>Subtotal</b>	<b>915,000</b>

Master Project Account	
Debt Service	350,000
<b>Subtotal</b>	<b>350,000</b>

Recycling Business Assistance Account	
Materials & Services	700,000
<b>Subtotal</b>	<b>700,000</b>

General Expenses	
Interfund Transfers	4,209,801
Contingency	11,358,338
<b>Subtotal</b>	<b>15,568,139</b>

Unappropriated Balance	15,017,337
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<b>Total Fund Requirements</b>	<b>\$82,009,210</b>
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**SUPPORT SERVICES FUND**

Finance Department	
Operating Expenses (PS & M&S)	\$2,552,507
<u>Subtotal</u>	<u>2,552,507</u>
Business Support Department	
Operating Expenses (PS & M&S)	4,241,749
Debt Service	34,620
Capital Outlay	309,000
<u>Subtotal</u>	<u>4,585,369</u>
Public Affairs - Creative Services	
Operating Expenses (PS & M&S)	538,375
<u>Subtotal</u>	<u>538,375</u>
Office of Metro Attorney	
Operating Expenses (PS & M&S)	1,153,083
<u>Subtotal</u>	<u>1,153,083</u>
Office of the Auditor	
Operating Expenses (PS & M&S)	607,940
<u>Subtotal</u>	<u>607,940</u>
General Expenses	
Interfund Transfers	756,557
Contingency	465,276
<u>Subtotal</u>	<u>1,221,833</u>
Unappropriated Balance	151,974
<b>Total Fund Requirements</b>	<b><u>10,811,081</u></b>

**ZOO CAPITAL FUND**

Operating Expenses (PS & M&S)	\$61,819
Capital Outlay	4,777,862
Contingency	500,000
Unappropriated Balance	2,893,193
<b>Total Fund Requirements</b>	<b><u>8,232,874</u></b>

**ZOO OPERATING FUND**

Operating Expenses (PS & M&S)	\$20,384,417
Capital Outlay	268,600
Interfund Transfers	2,600,295
Contingency	1,000,000
Unappropriated Balance	4,251,237
<b>Total Fund Requirements</b>	<b><u>28,504,549</u></b>
<b>TOTAL BUDGET</b>	<b><u>293,814,515</u></b>

## STAFF REPORT

### CONSIDERATION OF ORDINANCE NO. 03-1001 ADOPTING THE ANNUAL BUDGET FOR FISCAL YEAR 2003-04, MAKING APPROPRIATIONS AND LEVYING AD VALOREM TAXES, AND DECLARING AN EMERGENCY

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Date: March 14, 2003

Presented by: David Bragdon  
Council President

## BACKGROUND

I am forwarding to the Council for consideration and approval my proposed budget for Fiscal Year 2003-04.

Council action, through Ordinance No. 03-1001 is the final step in the process for the adoption of Metro's operating financial plan for the forthcoming fiscal year. Final action by the Council to adopt this plan must be completed by June 30, 2003.

Once the budget plan for Fiscal Year 2003-04 is adopted by the Council, the number of funds and their total dollar amount and the maximum tax levy cannot be amended without review and certification by the Tax Supervising and Conservation Commission. Adjustments, if any, by the Council to increase the level of expenditures in a fund are limited to no more than 10 percent of the total value of any fund's appropriations in the period between Council approval and adoption.

Exhibits B and C of the Ordinance will be available at the public hearing on April 3, 2003.

## ANALYSIS/INFORMATION

1. **Known Opposition** – Council hearings will be held on the Proposed Budget during the month of April 2003. Several opportunities for public comments will be provided. Opposition to any portion of the budget will be identified during that time.
2. **Legal Antecedents** – The preparation, review and adoption of Metro's annual budget is subject to the requirements of Oregon Budget Law, ORS Chapter 294. Oregon Revised Statutes 294.635 requires that Metro prepare and submit its approved budget to the Tax Supervising and Conservation Commission by May 15, 2003. The Commission will conduct a hearing during June 2003 for the purpose of receiving information from the public regarding the Council's approved budget. Following the hearing, the Commission will certify the budget to the Council for adoption and may provide recommendations to the Council regarding any aspect of the budget.
3. **Anticipated Effects** – Adoption of this ordinance will put into effect the annual FY 2003-04 budget, effective July 1, 2003.
4. **Budget Impacts** – The total amount of the proposed FY 2003-04 annual budget is \$283,529,423.

## RECOMMENDED ACTION

The Council President recommends adoption of Ordinance No. 03-1001.

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BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ADOPTING THE	)	ORDINANCE NO. 03-1001A
ANNUAL BUDGET FOR FISCAL YEAR 2003-	)	
04, MAKING APPROPRIATIONS, AND	)	
LEVYING AD VALOREM TAXES, AND	)	Introduced by
DECLARING AN EMERGENCY	)	David Bragdon, Council President

WHEREAS, the Multnomah County Tax Supervising and Conservation Commission held its public hearing on the annual Metro budget for the fiscal year beginning July 1, 2003, and ending June 30, 2004; and

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Zoo Tax Rate Levy	\$0.0966/\$1,000	
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3. The Pioneer Cemetery Perpetual Care Fund is hereby created for the purpose of providing for the long-term maintenance of the cemeteries. Major revenues for the fund shall come from a surcharge on grave sales. In the event of elimination of the fund, any balance remaining in the fund shall revert to any fund designated to care for the maintenance of the cemeteries or, in absence of that, the Regional Parks Operating Fund.

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ADOPTED by the Metro Council on this 12<sup>th</sup> day of June, 2003.

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David Bragdon, Council President

ATTEST:

Approved as to Form:

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Recording Secretary

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Daniel B. Cooper, General Counsel

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BEFORE THE METRO COUNCIL

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ATTEST:

Approved as to Form:

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Recording Secretary

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Daniel B. Cooper, General Counsel

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## STAFF REPORT

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Presented by: David Bragdon  
Council President

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4. **Budget Impacts** – The total amount of the proposed FY 2003-04 annual budget is \$283,529,423.

## RECOMMENDED ACTION

The Council President recommends adoption of Ordinance No. 03-1001.

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