

BEFORE THE COUNCIL OF THE  
METROPOLITAN SERVICE DISTRICT

FOR THE PURPOSE OF SUBMITTING	)	RESOLUTION NO. 86-714
METROPOLITAN SERVICE DISTRICT	)	
ZOO SERIAL LEVY	)	Introduced by the
	)	Zoo Planning Committee
	)	and the Executive Officer

WHEREAS, ORS 268.310(5) authorizes the Metropolitan Service District to "Acquire, construct, alter, maintain, administer and operate metropolitan zoo facilities.";

WHEREAS, ORS 268.315 provides that "For the purpose of performing the functions set forth in subsection (5) of ORS 268.310, the District, when authorized at any properly called election held for such purpose, shall have the power to levy an ad valorem tax on all taxable property within its boundaries not to exceed in any one year one-half of 1 percent (.005) of the true cash value of all taxable property within the boundaries of such District, computed in accordance with ORS 308.207.";

WHEREAS, The current three-year Zoo serial levy which provides funds for Zoo operations and capital improvements expires on June 30, 1987;

WHEREAS, The Zoo, with unique educational and recreational offerings, is utilized by and benefits District residents;

WHEREAS, The Zoo is the largest paid attraction for visitors throughout the state of Oregon and provides economic benefits to the Northwest and metropolitan region;

WHEREAS, A regional funding base is necessary to provide for continued adequate care, maintenance and development of the Zoo's animal collection, programs and physical facilities;

WHEREAS, During fiscal years 1988 through 1990 revenues of \$5,500,000 each year totaling \$16,500,000 for the three-year period will be needed to fund Zoo operating and capital expenses. For the three years staff estimates needing an average of \$3,725,000 each year for operating expenses and \$1,775,000 each year for capital expenses; now, therefore,

BE IT RESOLVED,

1. That the Council of the Metropolitan Service District approves submission of a mixed three-year operating and capital serial levy to be effective on July 1, 1987, to the voters of the District on March 31, 1987, the revenues of which will be used for the purposes permitted under ORS 268.310(5) and to pay the costs of holding the election.

2. That the ballot title for this measure is approved as shown on Exhibit A attached hereto.

3. That the Executive Officer is instructed to file this Resolution with the District Elections Officer and the Tax Supervising and Conservation Commission no later than February 4, 1987.

ADOPTED by the Council of the Metropolitan Service District this 18th day of December, 1986.

  
Richard Waker, Presiding Officer

DEC/gl  
6645C/485-2  
12/08/86

EXHIBIT A

1987 ZOO SERIAL LEVY  
BALLOT TITLE

CAPTION: SERIAL LEVY DEDICATED TO THE ZOO.

QUESTION: SHALL THE METROPOLITAN SERVICE DISTRICT LEVY \$5,500,000 EACH YEAR FOR THREE YEARS FOR THE WASHINGTON PARK ZOO?

EXPLANATION: THIS MEASURE ALLOWS THE DISTRICT TO LEVY \$5,500,000 EACH YEAR FOR THREE YEARS STARTING JULY 1, 1987. THE TOTAL LEVY IS \$16,500,000. IN 1980 AND 1984 DISTRICT VOTERS APPROVED THREE YEAR SERIAL LEVIES OF \$5,000,000 PER YEAR. THE LAST LEVY WILL EXPIRE JUNE 30, 1987. THIS NEW LEVY WILL PROVIDE APPROXIMATELY \$3,725,000 PER YEAR FOR ZOO OPERATIONS AND APPROXIMATELY \$1,775,000 PER YEAR FOR CAPITAL PROJECTS IN ACCORDANCE WITH THE THREE YEAR FINANCING PLAN. CAPITAL PROJECTS INCLUDE COMPLETION OF PHASE III OF THE AFRICA BUSH EXHIBIT, RENOVATION OF THE EAST BEAR EXHIBIT AND IMPROVEMENT OF ZOO FACILITIES AND EQUIPMENT. THE LEVY IS OUTSIDE THE 6 PERCENT LIMITATION SPECIFIED IN THE OREGON CONSTITUTION.

6713C/467-1  
12/17/86

(Text of ballot title)

SERIAL LEVY DEDICATED TO THE ZOO

Caption (10 words maximum)

QUESTION: (20 words maximum) Shall the Metropolitan Service District levy \$5,500,000 each year for three years for the Washington Park Zoo?

\*PURPOSE: (150 words maximum) This measure allows the District to levy \$5,500,000 each year for three years starting July 1, 1987. The total levy is \$16,500,000. In 1980 and 1984 District voters approved three year serial levies of \$5,000,000 per year. The last levy will expire June 30, 1987. This new levy will provide approximately \$3,725,000 per year for Zoo operations and approximately \$1,775,000 per year for capital projects in accordance with the three year financing plan. Capital projects include completion of Phase III of the Africa Bush Exhibit, renovation of the East Bear Exhibit and improvement of Zoo facilities and equipment. The levy is outside the 6 percent limitation specified in the Oregon Constitution.

\* For measures authorizing tax levies or establishing new tax bases: a concise and impartial statement of not more than 150 words, explaining chief purpose of the measure and giving reasons for the measure. If an estimated tax is included in a ballot title, it must be based on a current estimate of assessed value by the County Assessor and must include the statement: "The estimated tax cost for this measure is an ESTIMATE only based on the best information available from the County Assessor at the time of estimate." Such statement required by ORS 310.395 shall not be included in the 150 word limitation.



NOTICE OF MEASURE ELECTION

Metropolitan Service District  
Name of District

On March 31, 1987, an election will be held in  
Date of Election

Metropolitan Service District  
Name of District

The following measure will be submitted to the voters of the district:

(Put text of ballot title on reverse side)

  
Authorized signature

Donald E. Carlson,  
Deputy Executive Officer  
Title

This notice must be filed by the 34th day before the election. (40th day before March, primary and general elections.)

(Text of ballot title)

RECEIVED

1986 DEC 22 PM 3:43

VICKI A. BATES,  
DIRECTOR OF ELECTIONS

SERIAL LEVY DEDICATED TO THE ZOO

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shall not be included in the 150 word limitation.

CONSIDERATION OF RESOLUTION NO. 86-714 FOR THE  
PURPOSE OF SUBMITTING METROPOLITAN SERVICE  
DISTRICT ZOO SERIAL LEVY

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Date: December 8, 1986

Presented by: Donald E. Carlson  
A. McKay Rich

FACTUAL BACKGROUND AND ANALYSIS

Policy Framework

Adoption of Resolution No. 86-714 is a significant step towards financial stability for Metro in general and the Zoo in particular. The Metro Council has adopted financial principles and policies for guidance in making financial decisions such as recommended by Resolution No. 86-714. The financial principles and policies stated in Resolution No. 84-444 relating to the Zoo are as follows:

"To assist in the achievement of the broad goal of providing financial stability for Metro, the following general principles are adopted:

1. Each functional area shall have identified sources of revenue;
2. Each functional area shall prepare a five-year financial plan; and
3. Any new functions assumed by Metro shall have a source of funding.

To aid decision-making in each of the functional areas, the following policies are adopted:

Zoo Operations

1. The Zoo shall rely on the property tax for a portion of its revenues.
2. Approximately 50 percent non-tax revenues shall be maintained for funding Zoo operations.
3. The Council shall annually review admission fees to assist in meeting Objective 2 above.
4. The Council shall develop a policy of maintaining a proper balance between funds used for animal and non-animal capital improvements and the use of private versus public funds.



5. As indicated in the adopted Master Plan, the priority for capital investments shall be the completion of the Zoo's development and the replacement of non-standard exhibits.
6. It shall be the policy of the Council to provide special benefits to residents of the region who pay taxes to help support the Zoo."

#### Resolution Analysis

Resolution No. 86-714 has two major purposes: 1) it submits to the voters the type and amount of the proposed tax levy, and 2) it defines the Ballot Title for the proposed levy.

In regard to the first purpose, the Resolution, if adopted, submits a three-year serial levy to the voters at the March 31, 1987, election. The levy request is for \$5,500,000 per year for a total of \$16,500,000. The resolution establishes the use of the revenue to defray both operating expenses and capital expenses at the Zoo. For the three years an estimated average of \$3,725,000 each year will be used for operating purposes and \$1,775,000 each year for capital expenses. Justification for the amount of the proposed levy is found in the "Updated Five-Year Financial Projections for Washington Park Zoo" dated November 21, 1986. Three key pieces of information which show the revenue and expenditure needs for operating and improving the Zoo during the next five years are: Table I -- Operating Fund Requirements; Table II -- Operating Fund Resources; and Table III -- Capital Improvement Fund Requirements and Resources.

In regard to the second purpose, the resolution defines the Ballot Title for the measure which must meet certain statutory requirements as to form and content. ORS 310.390 requires the Ballot Title to consist of: a "caption" by which the measure is commonly referred (not more than 10 words); a "question" which states the purpose of the measure and is phrased so an affirmative response to the question corresponds to an affirmative vote on the measure (not more than 20 words); and, a concise and impartial "explanation" which gives the purpose and reasons for the measure. The "explanation" must be plainly worded and avoid as much as possible the use of technical terms and should not advocate a yes or no vote on the question (not more than 150 words).

#### Tax Levy Schedule

As indicated in Resolution No. 86-714, the date of the levy election is March 31, 1987. Prior to that date the Resolution directs filing of the Ballot Title with the Director of the Multnomah County Records and Elections by no later than February 4, 1987, with the Multnomah County Tax Supervising and Conservation Commission (TSCC) by no later than the same date. The schedule for Council consideration and adoption of this resolution is as follows:

Date

Purpose

December 11, 1986

Presentation and public hearing on  
Resolution No. 86-714.

December 18, 1986

Consideration and adoption of  
Resolution No. 86-714.

ZOO PLANNING COMMITTEE RECOMMENDATION

The Zoo Planning Committee unanimously recommends adoption of  
Resolution No. 86-714.

EXECUTIVE OFFICER'S RECOMMENDATION

The Executive Officer recommends adoption of Resolution  
No. 86-714.

DEC/gl  
6664C/485-2  
12/08/86



## MEMORANDUM

**To:** Metro Council **Date:** Nov. 21, 1986

**From:** A.M. Rich, Assistant Zoo Director  
Donald E. Carlson, Deputy Executive Officer

**Re:** Updated Five Year Financial Projections for Washington Park Zoo

As the Council is aware, significant operational and capital improvements have been made at the Zoo since it became an operating division of Metro in 1976. Capital improvements include:

1. Improvements at Entryway
2. New Elephant Yard and Crush
3. Primate House Remodel
4. New Quarantine Facilities
5. Lemur Exhibit
6. Cascade Stream and Pond
7. New Maintenance Facilities
8. Penguinarium Remodel
9. Swigert Fountain
10. Bandstand
11. Alaska Tundra Exhibit
12. Gift Shop Remodel
13. West Bear Grotto Remodel
14. Elephant Museum

These improvements, new special events and promotions, and exceptional weather brought attendance to a 21 year high of 814,548 in fiscal year 1984-85. We anticipate attendance for 1986-87 to reach at least 850,000.

To keep the Zoo obtaining approximately 50 percent of its operating requirements from non-tax sources, the Council adjusted admission fees on June 1, 1981 and again on February 1, 1985. Current fees are \$2.50 for 12 years through 64 years, and \$1.25 for youth 3 through 11 years. Children under 3 are admitted free and senior citizens pay the same as youth. All people are admitted free after 3:00 p.m. on Tuesday afternoons. Additionally, there are free days for special groups, such as handicapped, children and seniors.

In May 1984, the voters of the District approved a \$5 million per year serial levy with approximately \$3 million per year for operations and \$2 million for capital improvements. That levy began July 1, 1984 and expires June 30, 1987. Projects to be built with the capital improvements portion of the levy, transfers from operating revenues and funds carried over from the previous levy are: West Bear Grotto Remodel, Africa Bush Phases I and II, and the Education/Administration Center. An additional project, the Elephant Museum, is being funded by private donations.

These additional facilities and increases in operations have helped the Zoo work toward these goals:

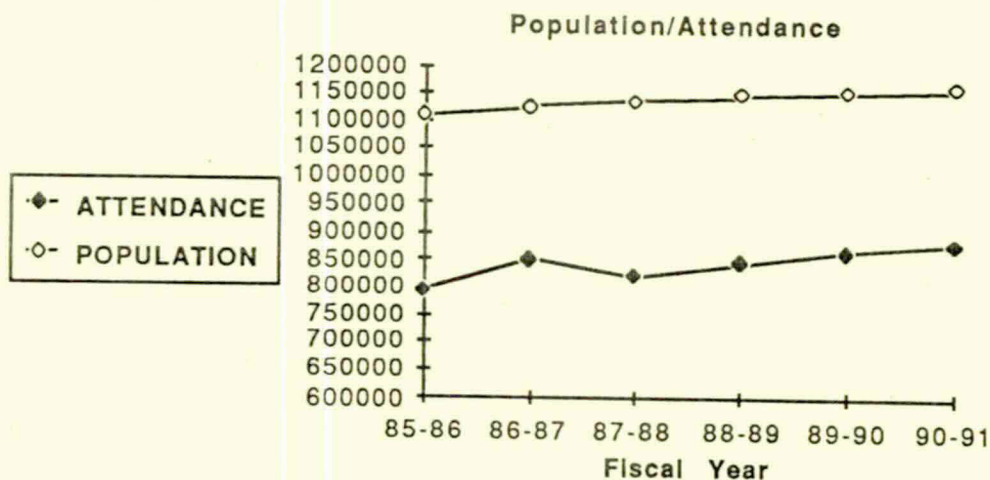
1. Providing a unique, educational and recreational opportunity through which the public can see and experience wildlife in a naturalistic setting.
2. Contributing to the perpetuation of animals in the wild by a) learning more about captive and wild animals, and b) educating the public regarding conservation.
3. Serving as a metropolitan cultural institution to enhance the quality of life in the metropolitan community.

### MAJOR ASSUMPTIONS

Adoption of a tax measure requires a budget forecast to determine future expenditures and needed revenue. In order to achieve a reasonable forecast, a number of assumptions must be made concerning external factors as well as Metro's budgetary and fiscal policies. Discussed below are major assumptions which are used in developing projections and the mix of projected non-tax and property tax revenues.

#### A. Attendance

Attendance records have been studied by both Metro and Hobson and Associates. Because a high correlation was found between historical population trends in Multnomah, Washington and Clackamas Counties and Zoo attendance, population projections for these jurisdictions have been used to forecast Zoo attendance. Actual paid and full attendance may be a function of many factors: weather, regional and local tourism promotions, new exhibits, animal births, special events (such as Zoo concerts), and the cost of other forms of recreation. Predicting future changes in these factors, however, is very difficult. Given these considerations, the forecasting approach selected was a necessarily simplistic one which focuses on the single factor of regional population/attendance historical trends. The projections are shown in the graph below:



Full attendance figures are derived from paid attendance projections assuming a constant 80 percent/20 percent split between paid and non-paid attendance. The figure shows full attendance increasing from 794,578 in 1985-86 to 880,000 in 1990-91. It should be noted that variables such as those listed earlier could significantly affect these forecasts plus or minus. It is our judgement, supported by studies done by Hobson and Associates, that the forecasts are prudent for projection purposes.



B. Admission Fees

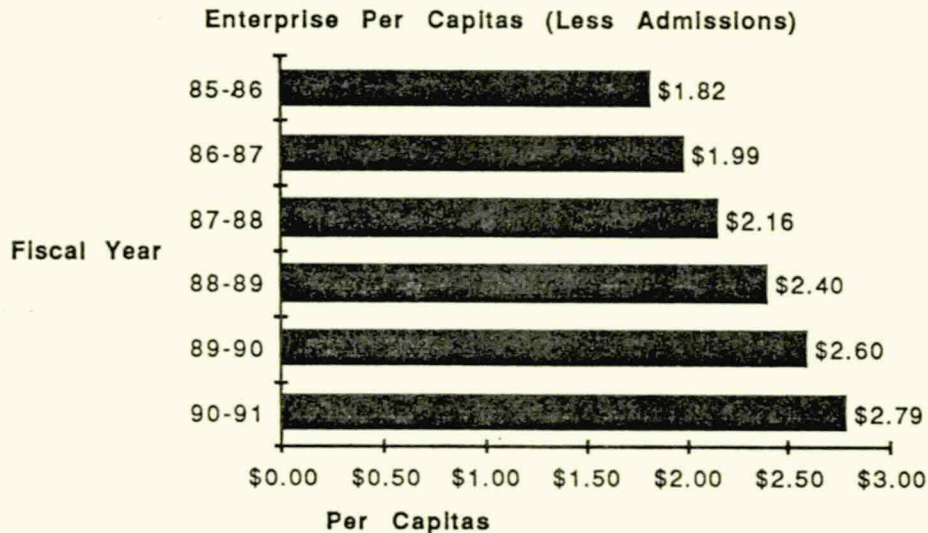
Admission revenue forecasts are based on the following preliminary schedule of fee increases:

<u>Effective Date</u>	<u>Adult</u>	<u>Youth/Seniors</u>
Current Fee	\$2.50	\$1.25
January 1, 1988	\$3.00	\$1.50
January 1, 1990	\$3.50	\$1.75

It is assumed that adult and youth/senior admissions will remain at the historical 2:1 ratio.

C. Per Capita Enterprise Revenue Excluding Admissions

Per capita revenues for food, gifts, railroad and other services are expected to rise as a result of increased attendance and longer stays in the Zoo because of more things to do and see. Per capita revenues are projected to rise as shown on the following graph..



D. Inflation

Based on a review of local and national economic trends, an inflation factor of 4 percent has been built into projections for expenditures and major enterprise revenues, excluding admissions.

E. Personal Services

Forecasts for personnel are based on current staffing levels plus new positions that will be required for additional programming. New exhibits, increased food services, more pathways and landscaping will require additional personnel in Animal Management, Visitor Services and Buildings and Grounds. Higher attendance levels and new programs will require new personnel in Educational Services as well.

It is anticipated that new facilities, coupled with more varied services and events and longer stays in the Zoo will aid in achieving the enterprise revenues necessary to meet the Council's policy of meeting 50% of operating costs from non-tax sources.

F. Materials and Services

While certain material and service costs such as merchandise for resale are directly related to Zoo attendance, other costs like those for utilities and those associated with an expanding animal collection are not that related to attendance. For the last several years material and service costs have increased an average of 8.8% per year. It is assumed this rate will continue.

G. Capital Outlay

Capital Outlay is projected to increase from 441,854 in 1986-87 to 494,324 in 1990-91. The Zoo plans to carry out a continuing facility improvements program during these years to upgrade utility systems, replace roofs, and replace equipment, etc.

H. Policy Assumptions

The following policy assumptions are incorporated in the Zoo budget forecast for the next five fiscal years.

- I. That property taxes collected will fund approximately fifty percent of operation and maintenance costs (personal services, materials and services, capital outlay, and transfers to the Insurance, Building and General Funds). Conversely, that non-property tax revenues - principally enterprise revenues - will fund the other approximately fifty percent of these same costs and that the Council will annually review admission fees to meet this objective. The table below shows the non-tax revenues as a percent of operations and maintenance as found in the projections.

<u>Projections</u>	<u>86-87</u>	<u>87-88</u>	<u>88-89</u>	<u>89-90</u>	<u>90-91</u>
Operations & Maint. Costs, incl. Insurance, Building and General Fund Transfers	\$7,122,203	\$7,478,795	\$8,019,759	\$8,493,089	\$8,888,942
Non-tax Revenue	\$3,470,878	\$3,577,520	\$4,024,035	\$4,441,762	\$4,853,433
	49%	48%	50%	52%	55%



2. That the Zoo's budget will provide for an unappropriated balance each year sufficient to balance the budget for the following year and assure cash flow from July 1 to tax collection time in November and that the budget will also provide a contingency line item equal to 3% of projected operating costs including the transfers. While the contingency is listed, it is assumed not to be spent and is included in the following year's fund balance.
3. That revenue in excess of operating needs will be transferred to the Capital Improvement Fund to assist with the implementation of the Zoo Master Plan.
4. That the Council will approve for implementation a sequence of projects found in the Zoo Master Plan and a method of funding them.

### FIVE YEAR OPERATING NEEDS

The five year needs for operating the Zoo are shown in Tables I and II (pages 8 through 10). Table I provides a summary of the expenditure requirements for the Zoo's six operating divisions: Administration, Animal Management, Buildings and Grounds, Education, Public Relations, and Visitor Services plus the various transfers. Table II summarizes the resources needed for these expenditures.

#### Expenditures:

Personal Services - As indicated in Table I, Personal Services is the largest category of expenditure for operating the Zoo, constituting an average 51% of the four principal expenditure categories. It is projected that Personal Services will increase at an average rate of approximately 5.5% per year through FY 1990-91. This increase is attributable to inflation and projected increases in the number of positions in Animal Management, Buildings and Grounds, Visitor Services and Educational Services.

The opening of Africa Bush in 1988-89 will require an additional keeper. This is because the Africa Bush exhibit will house more species of animals in a more complex facility than presently is true of the paddocks area.

In Buildings and Grounds there will be a need for an additional four FTE positions. These positions will help keep up with additional service demands created by increased attendance, more special events, and new facilities which will be more complex and labor intensive for maintenance and upkeep. These facilities include the major capital projects that are scheduled from 1987-88 through 1990-91 (Education/Administrative Center, Africa Bush I, II and III, and the East Bear Grotto).

Visitor Services and Educational Services will also be impacted. Visitor Services will need to expand its workforce as the Africafe and picnic areas come on line to serve more visitors and the Education/Administration Center will allow the Educational Services Division to increase its programs. Increased revenues from these sources are anticipated to more than offset operating costs.

Materials and Services - Materials and Services expenditures are the second largest item in operating the Zoo. This category constitutes an average of 31% of the operating budget and is projected to increase at an average rate of about 8% per year through 1990-91. This is attributable primarily to projected inflation plus increases for utility costs for new facilities and merchandise for resale to an increasing number of visitors.



Capital Outlay - The increase in capital outlay provides for necessary facility and equipment maintenance scheduled for this period. Capital outlay is only 6% of the Zoo's operating budget.

Transfers to the Insurance, General, and Building Funds - The Insurance Fund transfer pays that coverage for direct Zoo services such as liability insurance and the Zoo's proportionate share of other insurance requirements. The General Fund transfer is mainly for the purchase of services from the District's support service divisions. Included in support services are budget, accounting, personnel, data and word processing and printing. This transfer is based on a cost allocation policy and projected to increase according to the anticipated inflation rate of 4% annually. Actual future costs could vary plus or minus if the policy is modified. The Building Fund includes a proportionate share of the Metro office complex.

#### Revenue:

Table II (page 10) shows projected operating revenues and capital improvement transfers for the Zoo from FY 1986-87 to FY 1990-91. It is anticipated that the Zoo's enterprise revenues (admissions, food and concession sales, railroad fees, etc.) will increase from \$3,227,750 in 1986-87 to \$4,684,390 in 1990-91. Although part of this increase will come as a result of the number of Zoo visitors increasing and staying in the Zoo longer, it will be necessary for the Zoo to adjust the prices charged for its services, including admission fees. The Council should review admission fees annually and it should be noted that admission revenue projections are based on increases in fees on January 1, 1988 and 1990. Patrons will be receiving considerably more value for their fees as projects noted earlier are completed.

The tax figures shown in Table II are the amounts required to balance the projected budgets.

#### ZOO MASTER PLAN IMPLEMENTATION

To serve as a guide in making decisions for future capital improvements at the Zoo, the Council adopted a Zoo Master Plan in December 1983. That plan established several high priority projects that have been built or are in the process of being bid. The remaining projects are being reviewed and possibly modified. Schedules will be established when the Council approves an updated plan late next spring. Meanwhile, staff has recommended two major projects for funding under the next three years combined operations and capital improvements serial levy. These are Phase III of Africa Bush and the remodel of the East Bear Grotto.

Major projects to be built during the next four years include:

Africa Bush Phases I and II, to be financed with funds carried forward from the current year capital budget. This project will include, in addition to the animal exhibits, a new main food facility and improvements to the current concert lawn area.

Africa Bush III, which will include an upgraded electrical service for the lower side of the Zoo and exhibit space for such animals as lions, baboons, rock hyrax, gerbils, badgers, and spotted hyena, to be financed with new levy funds.

Completion of the Education/Administration Center, which will be financed with funds carried forward in the current budget.

Remodel of the East Bear Grotto to complement the work done on the West Bear Grotto. This project will primarily house bears such as spectacle or sloth bears, but might also include other species. This project is to be funded from the new levy.



TABLE I: OPERATING FUND REQUIREMENTS - FY 86-87 - 90-91

Levy Years					
PROJECTED ATTENDANCE	850,000	820,000	845,000	865,000	880,000
	86-87	87-88	88-89	89-90	90-91
	Revised Budget Estimate	Projected	Projected	Projected	Projected
OPERATING DIVISIONS					
Administration					
Personal Svcs.	\$241,605	\$258,113	\$274,792	\$289,948	\$305,050
Materials & Svcs.	\$240,735	\$145,408	\$151,440	\$225,215d	\$164,266
Capital Outlay	\$20,000	\$15,600	\$16,224	\$16,873	\$17,548
Sub-Total	\$502,340	\$419,121	\$442,456	\$532,036	\$486,864
Animal Management					
Personal Svcs.	\$1,176,532	\$1,218,795	\$1,298,809	\$1,359,770	\$1,418,987
Materials & Svcs.	\$218,100	\$217,776	\$238,817	\$256,919	\$267,196
Capital Outlay	\$17,800	\$14,352	\$19,252	\$17,773	\$18,484
Sub-Total	\$1,412,432	\$1,450,923	\$1,556,878	\$1,634,462	\$1,704,667
Buildings & Grounds					
Personal Svcs.	\$909,823	\$973,931	\$1,056,150	\$1,113,053	\$1,170,284
Materials & Svcs.	\$834,452	\$929,963	\$1,021,777	\$1,067,997	\$1,160,003
Capital Outlay	\$354,575	\$374,764	\$389,755	\$405,345	\$421,559
Sub-Total	\$2,098,850	\$2,278,658	\$2,467,682	\$2,586,395	\$2,751,846
Educational Services					
Personal Svcs.	\$372,403	\$437,844	\$463,078	\$488,648	\$513,665
Materials & Svcs.	\$79,094	\$96,720	\$102,833	\$106,946	\$111,809
Capital Outlay	\$4,725	\$5,200	\$5,408	\$5,624	\$5,849
Sub-Total	\$456,222	\$539,764	\$571,319	\$601,218	\$631,323
Public Relations					
Personal Svcs.	\$100,488	\$106,230	\$111,790	\$117,679	\$123,558
Materials & Svcs.	\$135,540	\$140,962	\$146,600	\$152,464	\$158,563
Capital Outlay	\$22,000	\$5,200	\$2,704	\$3,037	\$2,808
Sub-Total	\$258,028	\$252,392	\$261,094	\$273,180	\$284,929

As indicated above, a significant part of the projected capital improvement expenditures will be financed with funds carried forward in the Capital Improvements Fund. The projected Capital Fund balance at the end of this fiscal year is \$6,286,309 as indicated in Table III (page 11). Also shown are the projected revenues and expenditures for this fund for the years 1986-87 to 1990-91. The projection assumes no new levy for capital improvements for 1990-91. Decisions for that year and those following will be made after the Master Plan is updated.



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

Levy Years					
PROJECTED ATTENDANCE	850,000	820,000	845,000	865,000	880,000
	86-87	87-88	88-89	89-90	90-91
REVENUE PROJECTIONS	Rev. Budget Est.	Projected	Projected	Projected	Projected
Fund Balance	\$1,732,343	\$1,123,491 <sup>b</sup>	\$1,038,026	\$1,064,479	\$1,067,056
Taxes Current	\$4,691,950	\$5,005,000	\$5,005,000	\$5,005,000	\$3,247,336 <sup>c</sup>
Taxes Prior Year	\$460,000	\$495,000	\$500,000	\$500,000	\$500,000
ENTERPRISE REVENUES					
Admissions	\$1,419,500	\$1,506,340 <sup>a</sup>	\$1,693,380	\$1,877,915 <sup>a</sup>	\$2,057,440
Food Service/Vending	\$1,062,500	\$1,100,112	\$1,279,533	\$1,410,861	\$1,544,213
Gift Shop	\$340,000	\$375,232	\$429,557	\$486,504	\$545,622
Railroad	\$272,000	\$281,424	\$301,604	\$330,823	\$350,022
Rentals	\$17,000	\$16,400	\$16,900	\$17,300	\$17,600
Sale of Animals	\$10,000	\$15,000	\$10,000	\$10,000	\$15,000
Education Fees	\$58,850	\$68,750	\$78,000	\$86,250	\$96,000
Miscellaneous	\$47,900	\$52,000	\$54,080	\$56,243	\$58,493
SUB-TOTAL ENT. REV.	\$3,227,750	\$3,415,258	\$3,863,054	\$4,275,896	\$4,684,390
Interest Income	\$127,628	\$84,262	\$77,852	\$79,836	\$80,029
Zoo Parents	\$32,500	\$33,800	\$37,856	\$39,370	\$40,945
Donations	\$54,000	\$15,200	\$16,273	\$17,660	\$19,069
Grants	\$25,000	\$25,000	\$25,000	\$25,000	\$25,000
Sale of Equipment	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000
SUB-TOTAL	\$243,128	\$162,262	\$160,981	\$165,866	\$169,043
TOTAL REVENUE	\$10,355,171	\$10,201,011	\$10,567,061	\$11,011,241	\$9,667,825
a - Assumes Fee Increase on January 1, 1988 and January 1, 1990.					
b - Includes previous year unappropriated balance plus contingency.					
c - Assumes no levy for capital improvements.					



TABLE I: OPERATING FUND REQUIREMENTS (CONT.) - FY 86-87 - 90-91

		Levy Years			
Visitor Services					
Personal Svcs.	\$714,105	\$757,769	\$788,080	\$819,603	\$852,387
Materials & Svcs.	\$602,410	\$651,695	\$738,616	\$818,370	\$898,353
Capital Outlay	\$22,754	\$29,120	\$43,264	\$26,997	\$28,077
Sub-Total	\$1,339,269	\$1,438,584	\$1,569,960	\$1,664,970	\$1,778,817
Total All Divisions		\$6,067,141	\$6,379,442	\$6,869,389	\$7,292,261
OPERATING TRANSFERS		FY 86-87	FY 87-88	FY 88-89	FY 89-90
Building Fund	\$93,581	\$97,324	\$101,217	\$105,266	\$109,477
General Fund	\$497,274	\$517,165	\$537,852	\$559,366	\$581,740
Insurance	\$256,764	\$267,035	\$277,716	\$288,825	\$300,378
Sub-Total	\$6,914,760	\$7,260,966	\$7,786,174	\$8,245,718	\$8,630,041
CONTINGENCY		\$207,443	\$217,829	\$233,585	\$247,371
Sub-Total	\$7,122,203	\$7,478,795 <sup>a</sup>	\$8,019,759	\$8,493,089	\$8,888,942
UNAPPROPRIATED BALANCE		\$916,048	\$820,197	\$830,894	\$819,685
TRANSFER TO CAPITAL FUND		\$2,316,920	\$1,902,019	\$1,716,408	\$1,698,467
Total Expenditures		\$10,355,171	\$10,201,011	\$10,567,061	\$11,011,241
SUMMARY:					
Personal Services	\$3,514,956	\$3,752,682 <sup>b</sup>	\$3,992,699 <sup>c</sup>	\$4,188,701	\$4,383,931
Materials & Services	\$2,110,331	\$2,182,524	\$2,400,083	\$2,627,911	\$2,760,190
Capital Outlay	\$441,854	\$444,236	\$476,607	\$475,649	\$494,325
Transfer to Building Fund	\$93,581	\$97,324	\$101,217	\$105,266	\$109,477
Transfer to Support Svcs.	\$497,274	\$517,165	\$537,852	\$559,366	\$581,740
Transfer to Insurance	\$256,764	\$267,035	\$277,716	\$288,825	\$300,378
TOTAL OPERATING EXPENSE	\$6,914,760	\$7,260,966	\$7,786,174	\$8,245,718	\$8,630,041
a - Expenditures are projected on the basis of changes in programs and 4% inflation beginning in 1987-88.					
b - Includes additional education/graphics staff and maintenance workers.					
c - Includes additional animal keeper and maintenance workers.					
d - Includes election cost.					



TABLE III: CAPITAL IMPROVEMENT FUND REQUIREMENTS AND RESOURCES - FY 86-87 - 90-91

Levy Years					
	86-87	87-88	88-89	89-90	90-91
EXPENDITURES					
Alaska Tundra	\$80,000	\$30,000			
Elephant Museum	\$284,246				
Electrical Upgrade				\$500,000	
Misc. Impr. & Exhibit Dev.	\$30,000	\$115,000	\$115,000	\$115,000	\$115,000
Africa Bush I and II	\$1,500,000	\$5,130,790	\$1,070,000		
Education/Admin. Center	\$500,000	\$376,136			
West Bear Grotto	\$100,000				
Update Master Plan	\$100,000				
Africa Bush III		\$280,000	\$1,700,000	\$1,759,550	\$50,000
East Bear Grotto			\$100,000	\$600,000	\$700,000
Construction Manager	\$47,166	\$49,525	\$52,001	\$54,601	\$57,331
TOTAL	\$2,641,412	\$5,981,451	\$3,037,001	\$3,029,151	\$922,331
Unappropriated Balance	\$6,286,309	\$2,783,350	\$1,746,508	\$621,812	
TOTAL EXPENDITURES	\$8,927,721	\$8,764,801	\$4,783,509	\$3,650,963	\$922,331
REVENUES					
Beginning Fund Balance	\$5,878,498	\$6,286,309	\$2,783,350	\$1,746,508	\$621,812
Donations/Bequests	\$225,000	\$75,000	\$75,000	\$75,000	\$75,000
Interest	\$462,303	\$471,473	\$208,751	\$130,988	\$46,636
Transfer - Operating Fund	\$2,316,920	\$1,902,019	\$1,716,408	\$1,698,467	\$178,883
Other	\$45,000	\$30,000			
TOTAL REVENUES	\$8,927,721	\$8,764,801	\$4,783,509	\$3,650,963	\$922,331

EXHIBIT A

1987 ZOO SERIAL LEVY  
BALLOT TITLE

CAPTION: SERIAL LEVY DEDICATED TO THE ZOO.

QUESTION: SHALL THE METROPOLITAN SERVICE DISTRICT LEVY \$5,500,000 EACH YEAR FOR THREE YEARS FOR THE WASHINGTON PARK ZOO?

EXPLANATION: THIS MEASURE ALLOWS THE DISTRICT TO LEVY \$5,500,000 EACH YEAR FOR THREE YEARS STARTING JULY 1, 1987. THE TOTAL LEVY IS \$16,500,000. IN 1980 AND 1984 DISTRICT VOTERS APPROVED THREE YEAR SERIAL LEVIES OF \$5,000,000 PER YEAR. THE LAST LEVY WILL EXPIRE JUNE 30, 1987. THIS NEW LEVY WILL PROVIDE APPROXIMATELY \$3,725,000 PER YEAR FOR ZOO OPERATIONS AND APPROXIMATELY \$1,775,000 PER YEAR FOR CAPITAL PROJECTS IN ACCORDANCE WITH THE THREE YEAR FINANCING PLAN. CAPITAL PROJECTS INCLUDE COMPLETION OF PHASE III OF THE AFRICA BUSH EXHIBIT, RENOVATION OF THE EAST BEAR EXHIBIT AND IMPROVEMENT OF ZOO FACILITIES AND EQUIPMENT. THE LEVY IS OUTSIDE THE 6 PERCENT LIMITATION SPECIFIED IN THE OREGON CONSTITUTION.

6713C/467-1  
12/17/86



## 1987 SPECIAL DISTRICT ELECTIONS CALENDAR

Date of Election	March 31	May 19	June 30	August 11	September 15	November 3
Election Officer to send verification of board members notice to districts	November 29 <i>nca</i>	na	na	na	na	na
Deadline for districts to return verification of board members to Election Officer	December 10 <i>mailed 12/8/86</i>	na	na	na	na	na
Election Officer to publish notice of district board election	Not later than January 10	na	na	na	na	na
Deadline for candidate filings	February 19	na	na	na	na	na
Deadline for filing notice of measure election	<i>hand delivered 12-22-86</i> February 19	April 15	May 27	July 8	August 12	Sept. 30
Voter registration deadline	March 10	April 28	June 9	July 21	August 25	Oct. 13

ELECTION OFFICER shall publish Notice of Election in a newspaper of general circulation in the district.

School Districts under 300,000 shall hold elections for board members in March of each year.

School Districts over 300,000 shall hold elections for board members in March of odd-numbered years.

Fire and Water Districts shall hold elections for board members in March of odd-numbered years.

# SPECIAL DISTRICT INFORMATION FORM

DISTRICT: METROPOLITAN SERVICE DISTRICT (METRO)

TYPE OF DISTRICT: METROPOLITAN  
SERVICE DISTRICT

ADDRESS: 2000 SW 1ST AVE  
PORTLAND, OR 97201

PRINCIPAL ACT: ORS 268

PHONE NO.: 221-1646

COUNTY(S): CLACKAMAS, MULTNOMAH-FO,  
WASHINGTON

CONTACT PERSON: RICK GUSTAFSON-EXECUTIVE OFFICER  
MARIE NELSON-ELECTION OFFICER

DATE NEXT REGULAR ELECTION: MAY 20, 1986

POS. NO.	AREA/ ZONE NO.	NOM./ ELECT BY	ELECT AT LARGE	NAME	TITLE (DIR./COMM./ LOC. SCHOOL COMM.)	YEAR ELECTED	DATE APP'TED	REG. TERM ENDING
1	1	ELECT		MIKE KAGSDALE	COUNCILOR	1986	1990	
2	1	"		RICHARD C. WAKER	"	1984	1988	
3	1	"		JIM GARDNER	"	1984	1988	
4	1	"		COBBY KIRKPATRICK	"	1984	1988	
5	1	"		THOMAS DEJARDIN	"	1984	1988	
6	1	"		GEORGE VAN BERGEN	"	1982	1986	
7	1	"		SHARON KELLEY	"	1982	1986	
8	1	"		JOHN FREWING	"	N/A	1985	
9	1	"		TANYA COLLIER	"	1986	1990	
10	1	"		LARRY L. COOPER	"	1984	1988	
11	1	"		DAVID KNOWLES	"	1986	1990	
12	1	"		GARY B. HANSEN	"	1982	1986	
				RICK GUSTAFSON	EXECUTIVE OFFICER	1982	1986	

*Olson resigned effective 10/1/86.  
Kagsdale appointed by Council to complete  
Olson's term thru 12/31/86. Kagsdale  
elected to serve commencing 1/1/87.*

*Frewing was appointed by the Council  
to replace Emil Bonnich effective 3/27/86.  
Mike Bonnich was elected 11/4/86 & his term starts 1/1/87.  
Myers resigned effective 4/30/86. Tanya Collier  
elected was appointed by the Council to serve  
commencing 7/10/86. She was elected 2/4/86 to  
serve commencing 1/1/87.*

*Kaufman resigned effective 11/13/86. Knowles  
was appointed by the Council to complete  
Kaufman's term thru 12/31/86. Knowles was  
elected to serve commencing 1/1/87.*

*Rona Cuerna will assume position  
1/1/87. She was elected 11/4/86 & her  
term expires 12/31/90.*

(Text of ballot title)

Caption (10 words maximum)

QUESTION: (20 words maximum)

\*PURPOSE: (75 words maximum)

\* For measures other than tax levies and tax bases: Concise and impartial statement of not more than 75 words of the chief purpose of the measure. Content requirements of ORS 255.085 (2) and ORS 450.905 apply to bond measures and certain sanitary authorities, respectively.



NOTICE OF MEASURE ELECTION

\_\_\_\_\_  
Name of District

On \_\_\_\_\_, and election will be held in  
Date of Election

\_\_\_\_\_  
Name of District

The following measure will be submitted to the voters of the district:

(Put text of ballot title on reverse side)

\_\_\_\_\_  
Authorized signature

\_\_\_\_\_  
Title

This notice must be filed by the 34th day before the election. (40th day before March, primary and general elections.)

NOTICE OF MEASURE ELECTION

\_\_\_\_\_  
Name of District

On \_\_\_\_\_, an election will be held in  
Date of Election

\_\_\_\_\_  
Name of District

The following measure will be submitted to the voters of the district:

(Put text of ballot title on reverse side)

\_\_\_\_\_  
Authorized signature

\_\_\_\_\_  
Title

This notice must be filed by the 34th day before the election. (40th day before March, primary and general elections.)

(Text of ballot title)

---

Caption (10 words maximum)

QUESTION: (20 words maximum) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\*PURPOSE: (150 words maximum) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\* For measures authorizing tax levies or establishing new tax bases: a concise and impartial statement of not more than 150 words, explaining chief purpose of the measure and giving reasons for the measure. If an estimated tax is included in a ballot title, it must be based on a current estimate of assessed value by the County Assessor and must include the statement: "The estimated tax cost for this measure is an ESTIMATE only based on the best information available from the County Assessor at the time of estimate." Such statement required by ORS 310.395 shall not be included in the 150 word limitation.



VICKI K. ERVIN  
Director of Elections



1040 S.E. Morrison St.  
Portland, Oregon 97214-2495  
(503) 248-3720

RECEIVED DEC 1 1986

November 24, 1986

To: Special Districts

From: Vicki K. Ervin, Director of Elections

Enclosed is a Special District Information Form required by Administrative Rule No. 25-1983, Secretary of State. Under this rule we are required to send you the most current information we have concerning the officers of your district. The rule further requires the district to examine this information making any corrections or updating it. The form should be returned to us no later than December 10, 1986.

Our office will publish the Notice of Election before January 10, 1987.

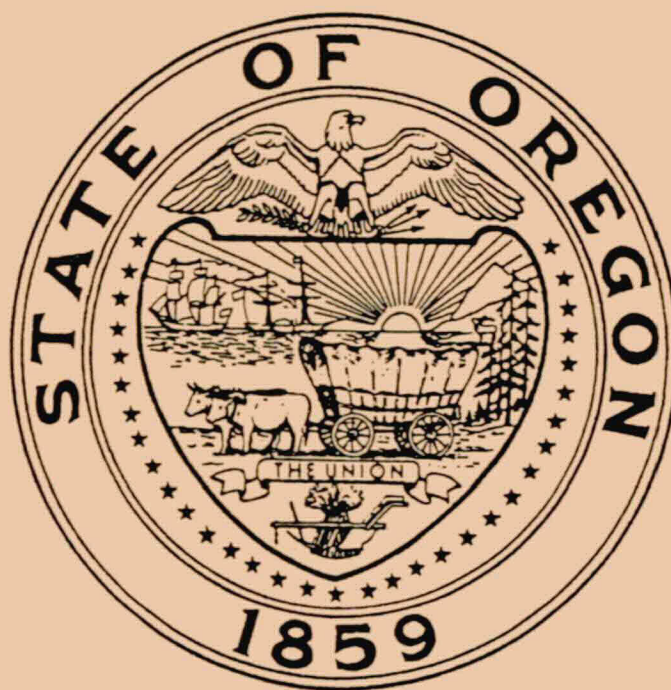
You are hereby notified, pursuant to subsection (2), section 1, chapter 805, Oregon Laws 1981, as amended, that Multnomah County intends to hold all permissible elections by mail during calendar year 1987. If you wish to be notified as to whether a specific election scheduled by the county, city or district will be held by mail, you must notify this office, in writing, that the county, city or district is planning to hold an election on that date. Such notice shall be filed in the office of the director of elections not later than 5:00 p.m. on the 41st day before the specified election date.

Enclosed are candidate and measure filing forms, a copy of the Local Elections Manual and the 1987 Elections Calendar.

If you have any questions, please call Dolores Schmidt or Jeff Klein, 248-3727.

1986

# LOCAL ELECTIONS



Compiled and Published by

Barbara Roberts  
Secretary of State  
Elections Division

BARBARA ROBERTS  
SECRETARY OF STATE



RAYMOND A. PHELPS, JR.  
DIRECTOR

141 STATE CAPITOL  
SALEM, OREGON 97310-0722  
(503) 378-4144

## INTRODUCTION

This manual has been prepared for use by county and city governing bodies, district election authorities and county election officers in the conduct of elections throughout the state. The purpose is to provide uniformity in administration of elections for the more than 1,500 local election districts in the State of Oregon. A general procedure has been provided for district election authorities, candidates and county and city election officers to follow during an election cycle. However, election officers for cities and home rule counties should check their charters and ordinances for provisions that may impose additional requirements.

Local Elections Calendars have been included in this manual for 1986 and 1987. However, dates on the 1987 calendar could change as a result of action by the 1987 Legislative Assembly. Be sure to check with your election officer before using this calendar for developing your election schedule for 1987. This will insure that you are using current information.

Administrative rules and directives will be issued by the Secretary of State from time to time. Administrative rules will be issued as directed by statute. Directives will be prepared to establish and maintain uniformity in the application, operation and interpretation of the election laws. Copies of administrative rules and directives will be sent to county election officers for distribution to all local election authorities in the clerks' respective counties.

County election officers will provide a copy of this manual to each city governing body and special district board in their jurisdiction. It is recommended that each person responsible for coordinating elections for a city or special district contact and work closely with the county election officer to avoid problems. The Elections Division of the Secretary of State's office is also available to answer questions and assist in resolving problems. A list of county election officers appears in the appendix of this manual.

A handwritten signature in cursive script that reads "Barbara Roberts".

BARBARA ROBERTS  
Secretary of State



LOCAL ELECTIONS  
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## 1986-1987 ELECTION DATES

Following are the dates in 1986 and 1987 on which counties, cities, and special districts may hold elections.

### 1986

March 25, 1986	Regular Election of School District Directors.
May 20, 1986	Primary Election. Nomination or election of City Officers.
June 24, 1986	
August 12, 1986	
September 16, 1986	
November 4, 1986	General Election. Election of City Officers not elected at Primary Election.

### 1987\*

March 31, 1987	Regular Election of Special District Directors.
May 19, 1987	
June 30, 1987	
August 11, 1987	
September 15, 1987	
November 3, 1987	

\*The next regular session of the Legislative Assembly will convene in January 1987. Therefore, the dates listed for 1987 are subject to change. Check with your election officer or the Elections Division of the Secretary of State's office for current information.

## GENERAL DEFINITIONS

1) "County Clerk" means the county clerk or the county official in charge of elections. The County Clerk, for all elections conducted in the county, appoints and trains election boards; designates polling places; and prepares official and sample ballots, poll books and other materials necessary for the conduct of elections.

2) "District election authority" means the district board of directors or other body or officer authorized or required to call a district election.

3) "Election officer" means:

(a) For an office or a measure to be voted on in more than one county, the County Clerk of the county in which the administrative office of the district is located;

(b) For an office or a measure to be voted on in one county, the County Clerk of the county;

(c) The City Clerk, Auditor or Recorder for an office or a measure to be voted on in a city.

4) "Elector" means an individual qualified to vote under section 2, Article II, Oregon Constitution. Unless specifically provided otherwise, a person may vote in an election of a political subdivision of this state only if the person is an elector registered in the political subdivision.

5) "Measure" includes any of the following submitted to the people for their approval or rejection at an election:

(a) A proposed law.

(b) An Act or part of an Act of the Legislative Assembly.

(c) A revision of or amendment to the Oregon Constitution.

(d) Local, special or municipal legislation.

(e) A proposition or question.

6) "School District" means a common school district, a union high school district, an education service district or a community college district.



## SPECIAL DISTRICTS DEFINED

- 1) A domestic water supply district organized under ORS chapter 264.
- 2) A cemetery maintenance district organized under ORS chapter 265.
- 3) A park and recreation district organized under ORS chapter 266.
- 4) A mass transit district organized under ORS 267.010 to 267.390.
- 5) A transportation district organized under ORS 267.510 to 267.650.
- 6) A metropolitan service district organized under ORS chapter 268.
- 7) A translator district organized under ORS 354.605 to 354.715.
- 8) A library district organized under ORS 357.216 to 357.286.
- 9) A county road district organized under ORS 371.055 to 371.110.
- 10) A special road district organized under ORS 371.305 to 371.360.
- 11) A road assessment district organized under ORS 371.405 to 371.535.
- 12) A highway lighting district organized under ORS 440.305 to 440.410.
- 13) A health district organized under ORS 440.305 to 440.410.
- 14) A sanitary district organized under ORS 450.005 to 450.245.
- 15) A sanitary authority or water supply authority organized under ORS 450.675 to 450.989.
- 16) A county service district organized under ORS chapter 451.
- 17) A vector control district organized under ORS 453.020 to 452.170.
- 18) A rural fire protection district organized under ORS chapter 478.
- 19) An airport district organized under ORS chapter 494.
- 20) A geothermal heating district organized under ORS chapter 523.
- 21) A water improvement district organized under ORS chapter 552.
- 22) A water control district organized under ORS chapter 553.
- 23) A weather modification district organized under ORS 558.200 to 558.440.
- 24) A livestock district organized under ORS 607.005 to 607.051.
- 25) A port organized under ORS 777.005 to 777.725.
- 26) The Port of Portland established by ORS 778.010.
- 27) A school district.
- 28) Territory, other than territory within a city, proposed to be created, formed or incorporated into a district or to be annexed or otherwise added to a district.
- 29) A soil and water conservation district organized under ORS 568.210 to 568.801.

## SPECIAL DISTRICT ELECTION CHECKLISTS

The following are checklists of activities for district election authorities, candidates and election officers for elections of directors and measure elections. The activities are listed in the general order in which they occur, and include explanations and time frames for each activity. Refer to the Local Elections Calendars in the appendix of this manual for specific dates for 1986 and 1987.

Formation elections will require special procedures. Contact your county election officer for specific instructions.

### ELECTION OF DIRECTORS

Districts will hold elections of directors as follows:

<u>TYPE OF DISTRICT</u>	<u>ELECTION DAY</u>
Each school district having a population of under 300,000.	Annually, on the last Tuesday in March
School districts having populations of 300,000 or more.	Biennially, on the last Tuesday in March, odd numbered years.
All other districts, except Metropolitan Service District.	Biennially, on the last Tuesday in March, odd numbered years.
Metropolitan Service District.	Nominate or elect in primary election. Run-off at general election, if needed.

### CHECKLIST

#### RESPONSIBILITY

#### ACTION

Election  
Officer

- ☐ 1. Start update of district director information not later than 135th day before regular district election or formation election held at same time as primary or general election.
- ☐ 2. Publish notice of directors' elections not later than 110th day before primary or general election.
- ☐ 3. Start update of district director information not later than 115th day before regular district elections held in March.
- ☐ 4. Publish notice of directors' election not later than 80th day prior to the March election.

## RESPONSIBILITY

## ACTION

Candidates  
Filing by  
Petition

- ☐ 5. Obtain signatures of 10 percent of district electors or of 25 district electors, whichever is less.

It is recommended that a petitioner obtain at least 10% more than the required number of signatures to insure that the petition contains a sufficient number of valid signatures. The signatures shall be on SED Form 108, which shall be attached to a completed SED Form 107. The election officer will provide the proper forms.

- ☐ 6. Have signatures on petition verified before filing petition.
- a. The petition must be submitted to the election officer in ample time for the verification process to be completed before 5:00 p.m. on the last day for filing declaration of candidacy.
  - b. Signatures of electors from more than one county in a multi-county district must be verified by the election officers in the appropriate counties before being submitted to the election officer for filing. All signatures on any one petition sheet should be from the same county.

Candidates  
Filing by  
Declaration

- ☐ 7. Prepare declaration of candidacy and accompanying \$10 filing fee. Use Form 107.

All  
Candidates

- ☐ 8. File petitions for nomination or declarations of candidacy with election officer not sooner than the 80th day before the election and not later than 5:00 p.m. on the 40th day before the election. Petitions for nomination must be accompanied by required number of verified signatures of electors of the district. Declaration of candidacy must be accompanied by \$10 filing fee.

- a. Qualifications for special district candidates differ, depending on the type of district. These qualifications are defined in the principal act governing the type of district and should be reviewed if there are any questions regarding your candidacy. ORS chapter numbers for principal acts are listed under "Special Districts Defined" on page 2 of this manual.
- b. The position or zone number assigned to an office on the district board must be shown on each petition for nomination, declaration of candidacy and certificate of nomination for election to the district board.



RESPONSIBILITY

ACTION

All

Candidates ☐  
Filed for  
March Election

9. File withdrawal of candidacy, if applicable, not later than 5:00 p.m. on the 40th day before the election. SED Form 122 shall be used for this purpose.

District ☐  
Candidates on  
Primary or General Election  
Ballot

10. File declarations of candidacy or petitions for nomination with the election officer not sooner than the 80th day before the election and not later than 5:00 p.m. on the 70th day before primary or general election. Metropolitan Service District candidates may file not sooner than 250th day before election.

- a. Candidates for Metropolitan Service District office file pursuant to ORS chapter 249.

(1) Filing may be accomplished by:

Paying a \$25 fee, for councilor candidates, or \$100 fee, for executive officer candidates, and filing a completed declaration of candidacy with the election officer. SED Form 102 shall be used for this purpose; or

Filing a petition signed by 500 electors or a number of electors equal to 2% of the votes cast in the candidate's subdistrict for the candidate for judge of the Supreme Court who received the most votes at the last election at which such judge was elected, whichever is less. It is recommended that a petitioner obtain at least 10% more than the required number of signatures to insure that the petition contains a sufficient number of valid signatures. Signatures shall be on SED Form 106 which shall be attached to a completed SED Form 102.

(2) Before circulating a petition for signatures, a Metro candidate shall file completed SED Forms 102 and 106, except for signatures of electors, with the election officer, as a prospective petition.

(3) Metro candidates are entitled to 29.8 square inches of space (not more than 325 words) in the primary and general election voters' pamphlets, at a cost of \$50 for each election. Voters' pamphlet material shall be filed with the Secretary of State not later than the 68th day before the primary election and not later than the 70th day before the general election.

## RESPONSIBILITY

## ACTION

- b. Soil and water conservation district officers are elected at the general election. Candidates for soil and water conservation General district offices should refer to ORS chapter 568 for filing procedures and requirements.

- ☐ 11. File withdrawal of candidacy, if applicable, not later than 5:00 p.m. on the 70th day before the election. Metro candidates file withdrawals of candidacy, if applicable, not later than 67th day before the election. SED Form 122 shall be used for this purpose.

All Candidates  
and Political  
Committees

- ☐ 12. File the first pre-election contributions and expenditures reports or certificate of contributions and expenditures not sooner than the 39th day and not later than the 29th day before the election.
- a. A certificate of election shall not be issued until the proper contributions and expenditures reports have been filed.
- b. A candidate, a candidate's committee, or a political action committee that either receives or expends a total of more than \$500 in an election must file three detailed statements of contributions and expenditures; i.e., 2 pre-election reports, 1 post-election report. Supplemental reports may also be required under certain conditions.
- c. A candidate, the candidate's committee, or a political action committee that expects neither to receive nor expend a total of more than \$500 may file three detailed statements of contributions and expenditures, but need only file a certificate of contributions and expenditures. SED Forms 227 and 227A shall be used by candidates and committees respectively for filing the certificate. The certificate may be filed by a candidate or a candidate's committee not sooner than the time of filing a declaration of candidacy or petition for nomination, and by any other political committee not sooner than the 39th day before the election. In any case, the certificate must be filed not later than the 21st day before the election.
- d. Detailed information on campaign finance regulations is provided in the Campaign Contributions and Expenditures Manual published by this office.
- ☐ 13. File the second pre-election contributions and expenditures report not sooner than the 7th day and not later than the 4th day before the election.

RESPONSIBILITYACTION

Election  
Officer

- ☐ 14. Publish the facsimile ballot in a newspaper of general circulation in the district not sooner than the 15th day before the election and not later than election day.

NOTE: If the district election is held on the same day as a primary or general election, the district's facsimile ballot may be combined and published with the facsimile ballot for the primary or general election. In this case the facsimile ballot must be published not later than the 4th day before the election.

- ☐ 15. Deliver an abstract of the election results to each district involved in the election not later than the 10th day after the election.

NOTE: If the district election is held on the same day as a primary or general election deliver an abstract of the election results to each district not later than 20th day after election.

District  
Election  
Authority

- ☐ 16. Receive the abstract of votes from the county election officer.
- ☐ 17. Determine the results of the election not later than the 5th day after receiving the abstract.
- ☐ 18. Notify the election officer in writing of the results of the election of directors.

Election  
Officer

- ☐ 19. Receive notice of results of election of directors.
- ☐ 20. Deliver the certificates of election to the district election.

NOTE: The election officer shall not issue certificates of election until the proper contributions and expenditures reports have been filed.

All  
Candidates  
and Political  
Committees

- ☐ 21. File post-election contributions and expenditures report not later than the 30th day after the election.
- ☐ 22. File supplemental contributions and expenditures reports, as necessary.



District  
Election  
Authority

MEASURE ELECTION

- ☐ 1. Determine that an election is needed for a vote of the people on a proposed measure
- ☐ 2. Specify date on which election is to be held.
  - a. Generally, a measure election may be held each year on any six election dates designated by law.
  - b. Tax base elections may be held only at the primary or general election.
- ☐ 3. Prepare ballot title with the assistance of either the district attorney of the election officer's county or an attorney employed by the district election authority. See appendix of this manual for sample ballot questions and ballot title format.
  - a. A ballot title typically consists of a caption of not more than 10 words; a question of not more than 20 words; and a 75-word, impartial explanation of the measure.
  - b. A ballot title for any measure which authorizes a tax levy in excess of the 6% constitutional limitation or which establishes a new tax base shall consist of a caption of not more than 10 words; a question of not more than 20 words; and a 150-word statement explaining the chief purpose of the measure and giving reasons for the measure.

IMPORTANT: Additional information may be required as part of the ballot title by other statutes, depending on the type of measure being referred. It is recommended that governing bodies consult with legal counsel and the State Department of Revenue to insure that ballot titles contain all necessary elements.

- c. The party that provides a ballot title is responsible for insuring that the ballot title complies with the standard of minimum readability established by the Secretary of State to the fullest extent practicable, consistent with the requirements of impartiality, conciseness and accuracy. The Secretary of State, by administrative rule, has designated the Flesch Formula of Readability as the test for readability of ballot titles. A Reading Ease Score of not less than 60 has been adopted as the standard of minimum readability for this test. Copies of the administrative rule containing instructions for administering the test can be found in the appendix of this manual.

RESPONSIBILITY

ACTION

District  
Election  
Authority

☐

4. Deliver to the election officer a notice of measure election. Use SED Form 109A.

- a. The notice must be delivered not later than the 34th day before an election called at a time other than the primary, general or regular district election.
- b. The notice must be delivered not later than the 40th day before an election called at the same time as a primary or general election, or at the same time as regular district elections are held (the last Tuesday in March of each year).
- c. Notice of an election on a bond measure must include the purpose for which the bonds are to be used; the amount and term of the bonds; the kind of bonds to be issued. If the bond election is authorized by ORS 450.900, additional notice requirements are specified in ORS 450.905.

Election  
Officer

☐

5. Receive notice of measure election.

☐

6. Publish notice of measure election once in the next available edition of a newspaper of general circulation in the district after the deadline for filing the notice.

Political  
Committees  
Supporting or  
Opposing Measures

☐

7. File the first pre-election contributions and expenditures reports or certificate of contributions and expenditures not sooner than the 39th day and not later than the 29th day before the election.

- a. A political action committee that either receives or expends a total of more than \$500 in an election must file three detailed statements of contributions and expenditures; i.e., 2 pre-election reports, 1 post-election report. Supplemental reports may also be required under certain conditions.
- b. A political action committee that expects neither to receive nor expend a total of more than \$500 may file three detailed statements of contributions and expenditures, but need only file a certificate of contributions and expenditures. SED Form 227A shall be used by the committee for filing the certificate. The certificate must be filed not sooner than the 39th day and not later than the 21st day before the election.
- c. Detailed information on campaign finance regulations is provided in the Campaign Contributions and Expenditures Manual published by this office.

## MISCELLANEOUS PROVISIONS

Contests of election, recounts and recall: Procedures for contests, recounts and recalls at the special district level are the same as for any other election in this state. Contact the election officer or the Elections Division of the Secretary of State's office if you have questions concerning these areas.

Initiative and referendum: ORS 255.155 through 255.215 provide specific requirements for conduct of initiative and referendum in special districts. Detailed information about filing and signature requirements is provided in the "Initiative, Referendum and Recall" manual published by this office.

Emergency elections: Any special district may hold an election on a date other than one of the six specified if the district election authority resolves that an election is needed sooner than the next available election date to finance repairs to property damaged by fire, vandalism or a natural disaster.

A school district may also hold an election on a date other than one of the six specified if the school board receives a petition requesting an election, or if the district board finds that a school closure is imminent as a result of the defeat of a proposed levy. See ORS 255.355 for details on certain other conditions that must be met before such an election may be held.

Filling director vacancies: A vacancy in the office of director shall be filled by appointment. The appointed director shall serve until June 30 next following the succeeding regular election at which a successor is elected and qualified. Candidates for a position not regularly scheduled for election shall be elected only for the unexpired portion of the term.

If an unscheduled vacancy occurs after the deadline for publishing notice of the regular district election, but before the 20th day before the regular district election at which directors are to be elected, the vacancy shall be filled at the next regular election. When a vacancy occurs in this time frame, the district election authority and election officer shall follow Administrative Rules 20-035, 20-040 and 20-045, adopted by the Secretary of State.

If the unscheduled vacancy occurs less than 20 days before the next regular election at which district directors are to be elected, the director appointed to fill the vacancy will serve until June 30 next following the succeeding regular election at which a successor is elected and qualified. For example, if a vacancy occurs on a school district board within 20 days of the 1986 regular election, the director appointed to fill the vacancy would serve until June 30 next following the regular election held in 1987.



RESPONSIBILITY

ACTION

Election  
Officer

- ☐ 8. Publish the facsimile ballot in a newspaper of general circulation in the district not sooner than the 15th day before the election and not later than election day.

NOTE: If the district election is held on the same day as a primary or general election, the district's facsimile ballot may be combined and published with the facsimile ballot for the primary or general election. In this case the facsimile ballot must be published not later than the 4th day before the election.

- ☐ 9. Deliver an abstract of the election results to each district involved in the election not later than the 10th day after the election.

NOTE: If the district election is held on the same day as a primary or general election deliver abstract of the election results to each district not later than 20th day after election.

District  
Election  
Authority

- ☐ 10. Receive the abstract of votes from the county election officer.
- ☐ 11. Determine the results of the election not later than the 5th day after receiving the abstract.

Political  
Committees  
Supporting or  
Opposing Measures

- ☐ 12. File post-election contributions and expenditures report not later than the 30th day after the election.
- ☐ 13. File supplemental contributions and expenditures reports, as necessary.

## RESPONSIBILITY

## ACTION

If city governing body files the measure with the city elections officer without a ballot title the city elections office will immediately send two copies of the measure to the city attorney. The city attorney will provide a ballot title for the measure not later than the 5th business day after receiving copies of the measure and shall forward a copy of the ballot title to the governing body and the city election officer.

- c. See the appendix of this manual for sample ballot questions and ballot title format. Generally, a ballot title consists of a caption of not more than 10 words; a question of not more than 20 words; and a 75-word, impartial explanation of the measure.
- d. The ballot title of any measure which authorizes a tax levy in excess of the 6% constitutional limitation or which establishes a new tax base shall consist of a caption of not more than 10 words; a question of not more than 20 words; and a 150-word statement explaining the chief purpose of the measure and giving reasons for the measure.

**IMPORTANT:** Additional information may be required as part of the ballot title by other statutes, depending on the type of measure being referred. It is recommended that governing bodies consult with legal counsel and the State Department of Revenue to insure that ballot titles contain all necessary elements.

- e. The party that provides a ballot title is responsible for insuring that the ballot title complies with the standard of minimum readability established by the Secretary of State to the fullest extent practicable, consistent with the requirements of impartiality, conciseness and accuracy. The Secretary of State, by administrative rule, has designated the Flesch Formula of Readability for the test for readability of ballot titles. A Reading Ease Score of not less than 60 has been adopted as the standard of minimum readability for this test. Copies of the administrative rule containing instructions for administering this test can be found in the appendix of this manual.

## COUNTY AND CITY ELECTIONS CHECKLIST

Following is a checklist for county and city governing bodies, election officers and candidates. Activities are listed in the general order in which they will occur in the election cycle. If you have any questions about any phase of the election process as it applies to counties and cities, contact the county election officer or the Elections Division of the Secretary of State's office.

### CHECKLIST

#### RESPONSIBILITY

#### ACTION

County or City  
Govern-  
ing Body

☐

1. Determine that an election is needed for a vote of the people on a proposed measure.

☐

2. Specify date on which election is to be held.

- a. Generally, measure elections may be held each year on any of six election dates designated by law.

- b. Tax base elections may be held only at the primary or general election.

☐

3. Prepare a ballot title.

- a. The county governing body may prepare a ballot title for the measure. If the county governing body prepares the ballot title it shall file the measure and ballot title at the same time with the county clerk.

If county governing body filed the measure with the county clerk without a ballot title, the county clerk must immediately send two copies of the measure to the district attorney. The district attorney will provide a ballot title for the measure not later than the 5th business day after receiving copies of the measure and shall forward a copy of the ballot title to the governing body and the county clerk.

- b. The city governing body may prepare a ballot title for the measure. If the city governing body prepares the ballot title it shall file the measure and ballot title at the same time with the city elections officer.



## RESPONSIBILITY

## ACTION

- a. In some instances, a statutory exception to these normal deadlines may require an earlier filing time, and will control the filing date. Charter provisions, ordinances and applicable laws should be checked carefully.
- b. The city election officer is responsible for publication of any required notices. Again, charter and ordinances should be checked for notice requirements.

County  
Election  
Officer

- ☐ 8. Receive statements of measures, if any, and candidates from city election officer and county governing body.

County and City  
Candidates and  
Political  
Committees

- ☐ 9. File first pre-election contributions and expenditures report with county or city election officer not sooner than the 39th day and not later than the 29th day before the election.

- a. A certificate of election shall not be issued until the proper contributions and expenditures reports have been filed.
- b. A candidate, a candidate's committee, or a political action committee that either receives or expends a total of more than \$500 in an election must file three detailed statements of contributions and expenditures; i.e., 2 pre-election reports, 1 post-election report. Supplemental reports may also be required under certain conditions.
- c. A candidate, the candidate's committee, or a political action committee that expects neither to receive nor expend a total of more than \$500 in an election may file three detailed statements of contributions and expenditures, but need only file a Certificate of Contributions and Expenditures. SED Forms 227 and 227A shall be used by candidates and committees respectively for filing the certificate. The certificate may be filed by a candidate or a candidate's committee not sooner than the time of filing a declaration of candidacy or petition for nomination, and by any other political committee not sooner than the 39th day before the election. In any case, the certificate must be filed not later than the 21st day before the election.

RESPONSIBILITY

ACTION

County  
Candidates

☐

4. File declarations of candidacy, petitions for nomination or certificate of nomination with the county election officer not later than 70th day before primary or general election. See "Candidates and Political Parties" manual for filing procedures.

City  
Candidates

☐

5. File declarations of candidacy or petitions for nomination with the city election officer.

NOTE: City qualifications and filing requirements will vary because of differing charter and ordinance provisions. In any case, the candidate filing and verification process shall be completed in time for the city election officer to meet the deadline for filings certified statement of candidates and measures with the county election officer.

County  
Governing  
Body

☐

6. File with county election officer, not later than 61st day before primary or general election, or 34th day before any other election, each measure, including ballot title, referred by governing body.

NOTE: If a measure to be submitted to the electors of a county at a primary or general election was submitted and failed on the election date immediately preceding the primary or general election, the county governing body shall file that measure not later than the 40th day before the primary or general election.

City Elec-  
tion Officer

☐

7. Deliver to county election officer, not later than 61st day before primary or general election, or 34th day before any other election, a certified statement of measures, if any, including measure numbers and ballot titles, and information concerning all candidates for offices to be voted on at the election. Use SED Form 109A for statement of measures. Each city's measure numbers must begin at 51.

NOTE: If a measure to be submitted to the electors of a city at a primary or general election was submitted and failed on the election date immediately preceding the primary or general election, the chief city election officer shall deliver the certified statement for that measure not later than the 40th day before the primary or general election.

## MISCELLANEOUS PROVISIONS

Contest of election, recounts and recall: Procedures for contest, recounts and recalls in counties and cities are the same as for any other election in this state. Contact the county or city election officer or the Elections Division of the Secretary of State's office if you have questions concerning these areas.

Initiative and referendum: ORS 250.155 through 250.346 provide specific requirements for conduct of initiative and referendum in counties and cities. Detailed information about filing and signature requirements is provided in the "Initiative, Referendum and Recall" manual published by the Secretary of State.

Emergency elections: Under ORS 203.085 and 221.230 respectively, a county or city may hold an emergency election on a date other than one of the six provided if the county or city governing body resolves that an emergency exists that requires an election sooner than the next available date to avoid extraordinary hardship to the community.



RESPONSIBILITY

ACTION

County  
Election  
Officer

d. For more detailed information on campaign finance regulations, consult the "Campaign Contributions and Expenditures" manual published by this office.

- ☐ 10. File the second pre-election contributions and expenditures report not sooner than the 7th day and not later than the 4th day before the election.
- ☐ 11. Publish the facsimile ballot in a newspaper(s) designated under ORS 254.205 not sooner than the 15th day and not later than the 4th day before the election.

NOTE: If the county or city election is held on the same day as a primary or general election, the facsimile ballot may be combined and published with the facsimile ballot for the primary or general election.

- ☐ 12. Deliver abstract of votes to city election officer and county governing body not later than the 20th day after the election.
- ☐ 13. Prepare and deliver certificates of nomination or election to each county and precinct candidate receiving highest number of votes for election or nomination or office.

NOTE: Election officer shall not issue certificates of nomination or election until proper contributions and expenditures reports have been filed.

City  
Election  
Officer

- ☐ 14. Receive abstract of votes.
- ☐ 15. Prepare and deliver certificates of nomination or election to each city candidate having the most votes for nomination or election to office.

Note: Election officer shall not issue certificates of nomination or election until proper contributions and expenditures reports have been filed.

County and City  
Candidates  
and Political  
Committees

- ☐ 16. File post-election contributions and expenditures report not later than 30th day after election.
- ☐ 17. File supplemental contributions and expenditures reports as necessary.

## APPENDIX

# 1987 LOCAL ELECTIONS CALENDAR

FOR AN ELECTION HELD ON	MARCH 31 (See 1 below)	MAY 19 (See 1 below)	JUNE 30 (See 1 below)	AUGUST 11 (See 1 below)	SEPTEMBER 15 (See 1 below)	NOVEMBER 3 (See 1 below)
<b>ELECTION OFFICER MUST:</b>						
- Publish notice of DISTRICT BOARD ELECTION NOT LATER THAN	January 10	February 28	April 11	May 23	June 27	August 15
<b>CANDIDATE FOR DISTRICT BOARD MUST:</b>						
- File verified signatures or \$10 filing fee with Election Officer NOT LATER THAN 5 PM	February 19	April 9	May 21	July 2	August 6	September 24
- File contributions and expenditures reports as required	ASK ELECTIONS OFFICER FOR DETAILS					
<b>DISTRICT ELECTION AUTHORITY MUST:</b>						
- For MEASURE ELECTION - Give notice to Election Officer NOT LATER THAN	February 19	April 15	May 27	July 8	August 12	September 30
<b>COUNTY GOVERNING BODY AND CITY ELECTION OFFICER MUST:</b>						
- Give notice of election to Election Officer NOT LATER THAN	February 25	April 15	May 27	July 8	August 12	September 30
- Publish notices of election as required	DETERMINED BY STATUTE AND/OR CITY CHARTER OR ORDINANCE					
<b>ELECTION OFFICER MUST:</b>						
- Publish notice of DISTRICT MEASURE ELECTION in next available newspaper AFTER	February 19	April 15	May 27	July 8	August 12	September 30
- Publish facsimile ballot NOT SOONER THAN	March 16	May 4	June 15	July 27	August 31	October 19
- and, for DISTRICTS NOT LATER THAN	ELECTION DAY					
OR						
- for COUNTIES and CITIES NOT LATER THAN	March 27	May 15	June 26	August 7	September 11	October 30

1. Except for elections of directors held in conjunction with district formation elections, and Metropolitan Service District, school districts having populations of under 300,000 must hold elections of directors annually on the last Tuesday in March. All other districts must hold elections of directors biennially on the last Tuesday in March in odd-numbered years.

\* The next regular session of the Legislative Assembly will convene in January 1987. Therefore, the dates listed for 1987 are subject to change. Check with your election officer or the Elections Division of the Secretary of State's office for current information.

# 1986 LOCAL ELECTIONS CALENDAR

FOR AN ELECTION HELD ON	MARCH 25 (See 1 below)	MAY 20 (See 1, 2 and 3 below)	JUNE 24 (See 1 below)	AUGUST 12 (See 1 below)	SEPTEMBER 16 (See 1 below)	NOVEMBER 4 (See 1, 2 and 3 below)
<b>ELECTION OFFICER MUST:</b>						
- Publish notice of DISTRICT BOARD ELECTION NOT LATER THAN	January 4	January 30	April 5	May 24	June 28	July 17
<b>CANDIDATE FOR DISTRICT BOARD MUST:</b>						
- File verified signatures or \$10 filing fee with Election Officer NOT LATER THAN 5 PM	February 13	March 11	May 15	July 3	August 7	August 26
- File contributions and expenditures reports as required	ASK ELECTION OFFICER FOR DETAILS					
<b>DISTRICT ELECTION AUTHORITY MUST:</b>						
- For MEASURE ELECTION - Give notice to Election Officer NOT LATER THAN	February 13	April 10	May 21	July 9	August 13	September 25
<b>COUNTY GOVERNING BODY AND CITY ELECTION OFFICER MUST:</b>						
- Give notice of election to Election Officer NOT LATER THAN	February 19	March 20	May 21	July 9	August 13	September 4
- Publish notices of election as required	DETERMINED BY STATUTE AND/OR CITY CHARTER OR ORDINANCE					
<b>ELECTION OFFICER MUST:</b>						
- Publish notice of DISTRICT MEASURE ELECTION in next available newspaper AFTER	February 13	April 10	May 21	July 9	August 13	September 25
- Publish facsimile ballot NOT SOONER THAN	March 10	May 5	June 9	July 28	September 1	October 20
- and, for DISTRICTS, NOT LATER THAN	ELECTION DAY					
OR						
- for COUNTIES and CITIES, NOT LATER THAN	March 21	May 16	June 20	August 8	September 12	October 31

1. Except for elections of directors held in conjunction with district formation elections, and Metropolitan Service District, school districts having populations of under 300,000 must hold elections of directors annually on the last Tuesday in March. All other districts must hold elections of directors biennially on the last Tuesday in March in odd-numbered years.
2. Metropolitan Service District directors are nominated at the primary election and elected at the general election. (Even-numbered years only.)
3. Candidates for special district offices at the primary or general election must file declarations or petitions not later than the 70th day before the election



Klamath	Evelyn Biehn (R)	Phyllis Rutledge	Klamath Falls 97601	882-2501, EXT 257
Lake	Karen O'Connor (D)	Yvonne Overton	Lakeview 97630	947-2239
Lane	John E. Faw (Dir. of Finance & Mgt. Services)	David Spriggs	Eugene 97401	687-4234
Lincoln	Gloria McEwen (D)	Alesa Kirkland	Newport 97365	265-6611 x378/348
Linn	Del Riley (D)	Steven Druckenmiller	Albany 97321	967-3831
Malheur	Deborah R. DeLong (D)	Donita Olsen	Vale 97918	473-3151
Marion	Alan H. Davidson	Edna Lippert	Salem 97301	588-5225/588-5041
Morrow	Barbara Bloodsworth (D)	Donna Rietman	Heppner 97836	676-9061
Multnomah	Vicki Ervin	Allen Robertson Joe Enyeart	1040 SE Morrison Portland 97214-2495	248-3724/248-3720
Polk	Linda Dawson (R)	Dorothy Riddle	Dallas 97338-3179	370-2515/623-9217
Sherman	Linda Cornie (D)	Cleora Atkins	Moro 97039	565-3606
Tillamook	June Wagner (D)	Loretta Creech	Tillamook 97141	842-5511 x330/331
Umatilla	Dean Fouquette (D)	Barbara Mabee	Pendleton 97801	276-7111 x208/x258
Union	Nellie Bogue (R)	Barbara Baker	LaGrande 97850	963-1006 238/206
Wallowa	Marjorie Martin (D)	Mabel Osborn	Enterprise 97828	426-3226
Wasco	Sue A. Proffitt (D)	Linda Brown	The Dalles 97058	296-6159
Washington	Donald W. Mason, Dir. Assessments/Taxation	Michael Cox	345 E. Main St. Hillsboro 97123-4022	648-8767/640-3548/648-8856
Wheeler	Arlene Stegner (D)		Fossil 97830-0327	763-2400
Yamhill	Charles Stern (D)	Jan Colman	McMinnville 97128	472-9371 x289/x282

# COUNTY CLERKS AND ELECTIONS DEPUTIES

<u>COUNTY</u>	<u>COUNTY CLERK</u>	<u>ELECTIONS</u>	<u>ADDRESS</u>	<u>PHONE CLERK/ELECTIONS</u>
Baker	Julia Woods (D)	Jeanette LeGrande	Baker 97814-3398	523-6414 x211
Benton	Dan Burk, Dir. Rec/Elections	Irene Neshyba	Corvallis 97330	757-6831/757-6756
Clackamas	Juanita Orr (D)	Ben Marberry	Oregon City 97045	655-8551/655-8510
Clatsop	Norma Hunsinger (D)	Lori Davidson	Astoria 97103-0178	325-8511/325-8605
Columbia	Reta C. Kerry (D)	Mert Brooks	St. Helens 97051	397-3796
Coos	Mary Ann Wilson (D)	Beverly Owen	Coquille 97423-1899	396-3121, EXT 241
Crook	Grace G. Bannon (D)		Prineville 97754	447-6553
Curry	Eugene P. Bauman (D)	Elaine Joy	Gold Beach 97444	247-3210/247-3224/3223
Deschutes	Susie Penhollow	Suzan Taylor	Bend 97701	388-6544/388-6547
Douglas	Doris Wadsworth (R)	Doyle Shaver	Roseburg 97470	440-4324/440-4252
Gilliam	Christopher N. Childs (D)	Betty Jamieson	Condon 97823	384-2311/384-2721
Grant	Carol Voigt (R)		Canyon City 97820	575-1675/1676/0189
Harney	Avel Diaz (D)	Dolores Swisher	Burns 97720	573-6641
Hood River	H. M. Webber, Dir. Assess/Rec	Virginia Routson	Hood River 97031-2093	386-1442
Jackson	Kathy Beckett (D)	Donna Connor	Medford 97501	776-7242/776-7181
Jefferson	Elaine L. Henderson (D)	Leanna Krueger	Madras 97741-1707	475-6613
Josephine	Georgette Brown	Juanita Clark	Grants Pass 97526-2058	474-5240/474-5243

CONTENT OF  
THE BALLOT TITLE

The Department of Revenue, by rule, has adopted the following guidelines for submitting tax measures to electors. These criteria should be followed to insure that the ballot title is correct in all respects. Any questions regarding the content of the ballot title for such measures should be addressed to the Department of Revenue.

1. The caption is limited to ten words and the purpose is to identify the type of tax levy presented for voter approval. The name of the district and dollar figures shall not be included in the caption.

Examples:

- (a) "One-Year Operating Levy";
- (b) "Three-Year Operating Levy";
- (c) "Ten-Year Capital Construction Serial Levy"; or
- (d) "To Establish a Tax Base."

2. The question is limited to 20 words and is required to contain the following:

- (a) Name of municipal corporation;
- (b) Amount of the tax levy in dollars and cents;
- (c) Whether the levy is for operating purposes or capital construction;
- (d) That the levy is outside the tax base;
- (e) The specific time period for the levy; and
- (f) Indicate the first or only fiscal year of the levy.

Example:

"Shall (district name) levy \$ \_\_\_\_\_ outside the tax base for operating purposes for 1983-84"?

For fixed amount serial levies described in ORS 280.060(1)(a), which requires uniform dollar amounts each year, the amount to be levied each year shall be stated in the question and the aggregate total amount in the statement paragraph.

Example:

"Shall (district name) levy \$ \_\_\_\_\_ for three years outside the tax base for operating purposes beginning in 1983-84"?

Tax base ballot measures are worded differently.

Example:

"Shall (district name) levy \$ \_\_\_\_\_ tax base beginning with the 1983-84 fiscal year"?

3. The statement is limited to 150 words and is required to explain the purpose for the tax levy in plain language, and shall not advocate a yes or no vote on the question. The total amount of money to be raised by the proposed levy in dollars and cents shall be in the statement as required by ORS 310.395(1). ORS 310.402 requires that tax base ballot measures state the amount of the current tax base in dollars and cents.

The statements required by ORS 310.395 shall be placed at the end of the statement in a separate paragraph since they are not included in the 150-word maximum allowed.

## SAMPLE BALLOT TITLE FORMAT

The measure should appear on the ballot in the following format:

10-word caption by which measure  
is commonly referred to

QUESTION: Not more than 20 words.

EXPLANATION: Concise and impartial 75-word statement of chief  
purpose of measure;

OR

If measure authorizes tax levy outside constitutional limit or changes tax base, a concise and impartial 150-word statement explaining chief purpose of measure and giving reasons for the measure.



## Flesch Formula

### How to Count Words

- (1) Count each word in your piece of writing.
- (2) Count as a word all letters, numbers, or symbols, or groups of letters, numbers, or symbols, that are surrounded by white space. Count contractions and hyphenated words as one word. For example, count each of the following as one word: 1948, \$19,892, e.g., C.O.D., wouldn't, week-end.

### How to figure the Average Sentence Length

- (1) As your next step, figure the average number of words in your sentences:

- a) This means that you count all the sentences and then divide the number of words by the number of sentences, rounding off the result. For example, if you have 183 words and 9 sentences, the average sentence length is 20.
- b) In counting sentences, count as a sentence each unit of thought that is grammatically independent of another sentence or clause, if its end is marked by a period, question mark, exclamation point, semi-colon, or colon. Incomplete sentences or sentence fragments are also to be counted as sentences. For example, count as two sentences: What did the minister talk about? Sin. Count as two sentences: The Lord is my shepherd; I shall not want. Count as three sentences: There are two arguments against this plan: 1. It is too expensive. 2. It is impractical. Count as two sentences: Result: Nobody came. But count as one sentence only: He registered, but he did not vote. (Two independent clauses, combined into a compound sentence with only a comma.) Count as one sentence: There were three people present: Mary, Robert, and John. (The words after the colon are not a separate unit of thought.) Count as one sentence: This project is supposed to: (a) provide training; (b) stimulate suggestions. (No part of this is an independent clause. Count such material as one sentence even if it is paragraphed.)
- c) In dialogue, count the words he said or other speech tags as part of the quoted sentence to which they are attached. For example, count as one sentence: He said, "I have to go." Count also as one sentence: "That's all very well," he replied, showing clearly that he didn't believe a word of what we said.

Test of Readability and Standard  
of Minimum Readability for Ballot  
Titles Prepared for All Measures

Designation of a Test of Readability and Adoption of a Standard of Minimum Readability for Ballot Titles Prepared for All Measures.

ORS 250.055 provides that the Secretary of State shall designate a test of readability and adopt a standard of minimum readability for a ballot title.

The Flesch Formula for Readability is designated as the test for readability of a ballot title. Attainment of a specified readability level shall be complied with to the fullest extent practicable, consistent with the needs of impartiality, conciseness and accuracy. A Reading Ease Score of not less than 60 is adopted as the standard of minimum readability for this test.

The procedure for manual determination of readability of a ballot title by the Flesch method is set forth in this rule. An automated version of the manual procedure is available through the Executive Department.

To facilitate the readability determination procedure, the party that provides a ballot title may apply either the manual or the automated procedure to drafts of a ballot title prior to filing the ballot title with the appropriate filing officer. Contact the Elections Division of the Secretary of State's office for information on the use of the automated data entry process for determination of readability.

## How to Figure the Average Word Length

(1) As your next step, figure the average word length in syllables. To do that, count all syllables and divide the total number of syllables by the number of words. In the formula, this measure is expressed as the number of syllables per hundred words; therefore, multiply your result by 100.

(2) Count syllables the way you pronounce the word; e.g., asked has one syllable, George's two, determined three, and pronunciation five. Count the number of syllables in symbols and figures according to the way they are normally read aloud, e.g., two for \$ ("dollars"), three for R.F.D. ("are-eff-dee"), and four for 1916 ("nineteen sixteen"). However, if a passage contains lengthy figures or more than a few, your estimate will be more accurate if you leave these figures out of your syllable count.

(3) If in doubt about syllabication rules, use any good dictionary. Count the syllables in all the words, even if this may seem "unfair", e.g., in such words as vegetables or California. Otherwise your estimate will not be comparable to statistical estimates of other materials.

(4) As a practical shortcut, count all syllables except the first in all words of more than one syllable; then add the total to the number of words tested. It is also helpful to "read silently aloud" while counting.

## How to Find Your Reading Ease Score

(1) To find your Reading Ease Score, after you have found the average sentence length in words and the number of syllables per 100 words use the following formula:

Multiply the average sentence length by 1.015.....	_____
Multiply the number of syllables per 100 words by .846	_____
Add.....	_____
Subtract this sum from.....	206.835
.....	_____
Your Reading Ease Score is.....	_____

(2) The Reading Ease Score will put your piece of writing on a scale between 0 (practically unreadable) and 100 (easy for any literate person).

STAFF REPORT

Agenda Item No. 8.3

Meeting Date Dec. 18, 1986

CONSIDERATION OF RESOLUTION NO. 86-714 FOR THE  
PURPOSE OF SUBMITTING METROPOLITAN SERVICE  
DISTRICT ZOO SERIAL LEVY

---

Date: December 8, 1986

Presented by: Donald E. Carlson  
A. McKay Rich

FACTUAL BACKGROUND AND ANALYSIS

Policy Framework

Adoption of Resolution No. 86-714 is a significant step towards financial stability for Metro in general and the Zoo in particular. The Metro Council has adopted financial principles and policies for guidance in making financial decisions such as recommended by Resolution No. 86-714. The financial principles and policies stated in Resolution No. 84-444 relating to the Zoo are as follows:

"To assist in the achievement of the broad goal of providing financial stability for Metro, the following general principles are adopted:

1. Each functional area shall have identified sources of revenue;
2. Each functional area shall prepare a five-year financial plan; and
3. Any new functions assumed by Metro shall have a source of funding.

To aid decision-making in each of the functional areas, the following policies are adopted:

Zoo Operations

1. The Zoo shall rely on the property tax for a portion of its revenues.
2. Approximately 50 percent non-tax revenues shall be maintained for funding Zoo operations.
3. The Council shall annually review admission fees to assist in meeting Objective 2 above.
4. The Council shall develop a policy of maintaining a proper balance between funds used for animal and non-animal capital improvements and the use of private versus public funds.



5. As indicated in the adopted Master Plan, the priority for capital investments shall be the completion of the Zoo's development and the replacement of non-standard exhibits.
6. It shall be the policy of the Council to provide special benefits to residents of the region who pay taxes to help support the Zoo."

### Resolution Analysis

Resolution No. 86-714 has two major purposes: 1) it submits to the voters the type and amount of the proposed tax levy, and 2) it defines the Ballot Title for the proposed levy.

In regard to the first purpose, the Resolution, if adopted, submits a three-year serial levy to the voters at the March 31, 1987, election. The levy request is for \$5,500,000 per year for a total of \$16,500,000. The resolution establishes the use of the revenue to defray both operating expenses and capital expenses at the Zoo. For the three years an estimated average of \$3,725,000 each year will be used for operating purposes and \$1,775,000 each year for capital expenses. Justification for the amount of the proposed levy is found in the "Updated Five-Year Financial Projections for Washington Park Zoo" dated November 21, 1986. Three key pieces of information which show the revenue and expenditure needs for operating and improving the Zoo during the next five years are: Table I -- Operating Fund Requirements; Table II -- Operating Fund Resources; and Table III -- Capital Improvement Fund Requirements and Resources.

In regard to the second purpose, the resolution defines the Ballot Title for the measure which must meet certain statutory requirements as to form and content. ORS 310.390 requires the Ballot Title to consist of: a "caption" by which the measure is commonly referred (not more than 10 words); a "question" which states the purpose of the measure and is phrased so an affirmative response to the question corresponds to an affirmative vote on the measure (not more than 20 words); and, a concise and impartial "explanation" which gives the purpose and reasons for the measure. The "explanation" must be plainly worded and avoid as much as possible the use of technical terms and should not advocate a yes or no vote on the question (not more than 150 words).

### Tax Levy Schedule

As indicated in Resolution No. 86-714, the date of the levy election is March 31, 1987. Prior to that date the Resolution directs filing of the Ballot Title with the Director of the Multnomah County Records and Elections by no later than February 4, 1987, with the Multnomah County Tax Supervising and Conservation Commission (TSCC) by no later than the same date. The schedule for Council consideration and adoption of this resolution is as follows:

Date

Purpose

December 11, 1986

Presentation and public hearing on  
Resolution No. 86-714.

December 18, 1986

Consideration and adoption of  
Resolution No. 86-714.

ZOO PLANNING COMMITTEE RECOMMENDATION

The Zoo Planning Committee unanimously recommends adoption of  
Resolution No. 86-714.

EXECUTIVE OFFICER'S RECOMMENDATION

The Executive Officer recommends adoption of Resolution  
No. 86-714.

DEC/gl  
6664C/485-2  
12/08/86



# METRO

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

December 22, 1986

G. J. Gutjahr  
Administrative Officer  
Tax Supervising & Conservation Commission  
1510 Portland Building  
1120 S.W. Fifth Avenue  
Portland, Oregon 97204-1950

Dear Gil:

Enclosed please find the following documents necessary to file a serial levy tax measure for the Special election on March 31, 1987:

1. Metropolitan Service District Resolution No. 86-714, adopted by the Metro Council on December 18, 1986, which establishes the ballot title for the serial levy election;
2. Attachment "A" to the above Resolution; and
3. A completed "Notice of Measure Election" form required to be filed with Multnomah County.

Please call me if you have any questions.

Sincerely,

Donald E. Carlson  
Deputy Executive Officer

DEC/amn

Enclosures

cc: Marie Nelson  
Kay Rich

**Metro Council**

Richard Waker  
Presiding Officer  
District 2

Jim Gardner  
Deputy Presiding  
Officer  
District 3

Bob Oleson  
District 1

Corky Kirkpatrick  
District 4

Tom DeJardin  
District 5

George Van Bergen  
District 6

Sharron Kelley  
District 7

John Frewing  
District 8

Tanya Collier  
District 9

Larry Cooper  
District 10

Marge Kafoury  
District 11

Gary Hansen  
District 12

Executive Officer  
Rick Gustafson

EXHIBIT A

1987 ZOO SERIAL LEVY  
BALLOT TITLE

CAPTION: SERIAL LEVY DEDICATED TO THE ZOO.

QUESTION: SHALL THE METROPOLITAN SERVICE DISTRICT LEVY \$5,500,000 EACH YEAR FOR THREE YEARS FOR THE WASHINGTON PARK ZOO?

EXPLANATION: THIS MEASURE ALLOWS THE DISTRICT TO LEVY \$5,500,000 EACH YEAR FOR THREE YEARS STARTING JULY 1, 1987. THE TOTAL LEVY IS \$16,500,000. IN 1980 AND 1984 DISTRICT VOTERS APPROVED THREE YEAR SERIAL LEVIES OF \$5,000,000 PER YEAR. THE LAST LEVY WILL EXPIRE JUNE 30, 1987. THIS NEW LEVY WILL PROVIDE APPROXIMATELY \$3,725,000 PER YEAR FOR ZOO OPERATIONS AND APPROXIMATELY \$1,775,000 PER YEAR FOR CAPITAL PROJECTS IN ACCORDANCE WITH THE THREE YEAR FINANCING PLAN. CAPITAL PROJECTS INCLUDE COMPLETION OF PHASE III OF THE AFRICA BUSH EXHIBIT, RENOVATION OF THE EAST BEAR EXHIBIT AND IMPROVEMENT OF ZOO FACILITIES AND EQUIPMENT. THE LEVY IS OUTSIDE THE 6 PERCENT LIMITATION SPECIFIED IN THE OREGON CONSTITUTION.

6713C/467-1  
12/17/86

EXHIBIT A

1987 ZOO SERIAL LEVY  
BALLOT TITLE

CAPTION:  
(10 words)

SERIAL LEVY DEDICATED TO THE ZOO.

QUESTION:  
(20 words)

SHALL THE METROPOLITAN SERVICE DISTRICT LEVY  
\$5,500,000 EACH YEAR FOR THREE YEARS FOR THE  
WASHINGTON PARK ZOO?

EXPLANATION:  
(150 words)

THIS MEASURE ALLOWS THE DISTRICT TO LEVY  
\$5,500,000 EACH YEAR FOR THREE YEARS STARTING  
JULY 1, 1987. THE TOTAL LEVY IS \$16,500,000.  
IN 1980 AND 1984 VOTERS APPROVED LEVIES OF  
\$5,000,000 PER YEAR. THE LATTER WILL EXPIRE  
JUNE 30, 1987. THE NEW LEVY WILL PROVIDE FUNDS  
EACH YEAR FOR ZOO OPERATIONS AND CAPITAL  
IMPROVEMENTS. OVER THE THREE YEARS AN ESTIMATED  
AVERAGE OF \$3,725,000 PER YEAR WILL ENABLE THE  
ZOO TO CONTINUE THE CURRENT OPERATIONS. OVER  
THE THREE YEARS AN ESTIMATED AVERAGE OF  
\$1,775,000 PER YEAR WILL BE USED FOR CAPITAL  
PURPOSES. THIS INCLUDES COMPLETION OF PHASE III  
OF THE AFRICA BUSH EXHIBIT, RENOVATION OF THE  
EAST BEAR EXHIBIT AND TO IMPROVE AND EQUIP ZOO  
FACILITIES. THE LEVY IS OUTSIDE THE SIX PERCENT  
LIMITATION SPECIFIED IN THE OREGON CONSTITUTION.

6605C/467-2  
12/08/86

*not  
adopted*



## MEMORANDUM

**To:** Metro Council **Date:** Nov. 21, 1986

**From:** A.M. Rich, Assistant Zoo Director  
Donald E. Carlson, Deputy Executive Officer

**Re:** Updated Five Year Financial Projections for Washington Park Zoo

As the Council is aware, significant operational and capital improvements have been made at the Zoo since it became an operating division of Metro in 1976. Capital improvements include:

1. Improvements at Entryway
2. New Elephant Yard and Crush
3. Primate House Remodel
4. New Quarantine Facilities
5. Lemur Exhibit
6. Cascade Stream and Pond
7. New Maintenance Facilities
8. Penguinarium Remodel
9. Swigert Fountain
10. Bandstand
11. Alaska Tundra Exhibit
12. Gift Shop Remodel
13. West Bear Grotto Remodel
14. Elephant Museum

These improvements, new special events and promotions, and exceptional weather brought attendance to a 21 year high of 814,548 in fiscal year 1984-85. We anticipate attendance for 1986-87 to reach at least 850,000.

To keep the Zoo obtaining approximately 50 percent of its operating requirements from non-tax sources, the Council adjusted admission fees on June 1, 1981 and again on February 1, 1985. Current fees are \$2.50 for 12 years through 64 years, and \$1.25 for youth 3 through 11 years. Children under 3 are admitted free and senior citizens pay the same as youth. All people are admitted free after 3:00 p.m. on Tuesday afternoons. Additionally, there are free days for special groups, such as handicapped, children and seniors.

In May 1984, the voters of the District approved a \$5 million per year serial levy with approximately \$3 million per year for operations and \$2 million for capital improvements. That levy began July 1, 1984 and expires June 30, 1987. Projects to be built with the capital improvements portion of the levy, transfers from operating revenues and funds carried over from the previous levy are: West Bear Grotto Remodel, Africa Bush Phases I and II, and the Education/Administration Center. An additional project, the Elephant Museum, is being funded by private donations.

These additional facilities and increases in operations have helped the Zoo work toward these goals:

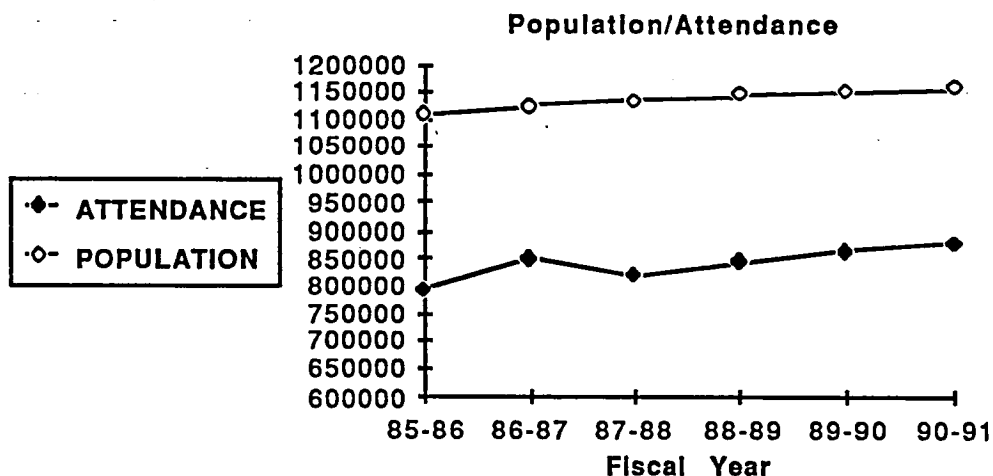
1. Providing a unique, educational and recreational opportunity through which the public can see and experience wildlife in a naturalistic setting.
2. Contributing to the perpetuation of animals in the wild by a) learning more about captive and wild animals, and b) educating the public regarding conservation.
3. Serving as a metropolitan cultural institution to enhance the quality of life in the metropolitan community.

### MAJOR ASSUMPTIONS

Adoption of a tax measure requires a budget forecast to determine future expenditures and needed revenue. In order to achieve a reasonable forecast, a number of assumptions must be made concerning external factors as well as Metro's budgetary and fiscal policies. Discussed below are major assumptions which are used in developing projections and the mix of projected non-tax and property tax revenues.

#### A. Attendance

Attendance records have been studied by both Metro and Hobson and Associates. Because a high correlation was found between historical population trends in Multnomah, Washington and Clackamas Counties and Zoo attendance, population projections for these jurisdictions have been used to forecast Zoo attendance. Actual paid and full attendance may be a function of many factors: weather, regional and local tourism promotions, new exhibits, animal births, special events (such as Zoo concerts), and the cost of other forms of recreation. Predicting future changes in these factors, however, is very difficult. Given these considerations, the forecasting approach selected was a necessarily simplistic one which focuses on the single factor of regional population/attendance historical trends. The projections are shown in the graph below:



Full attendance figures are derived from paid attendance projections assuming a constant 80 percent/20 percent split between paid and non-paid attendance. The figure shows full attendance increasing from 794,578 in 1985-86 to 880,000 in 1990-91. It should be noted that variables such as those listed earlier could significantly affect these forecasts plus or minus. It is our judgement, supported by studies done by Hobson and Associates, that the forecasts are prudent for projection purposes.

**B. Admission Fees**

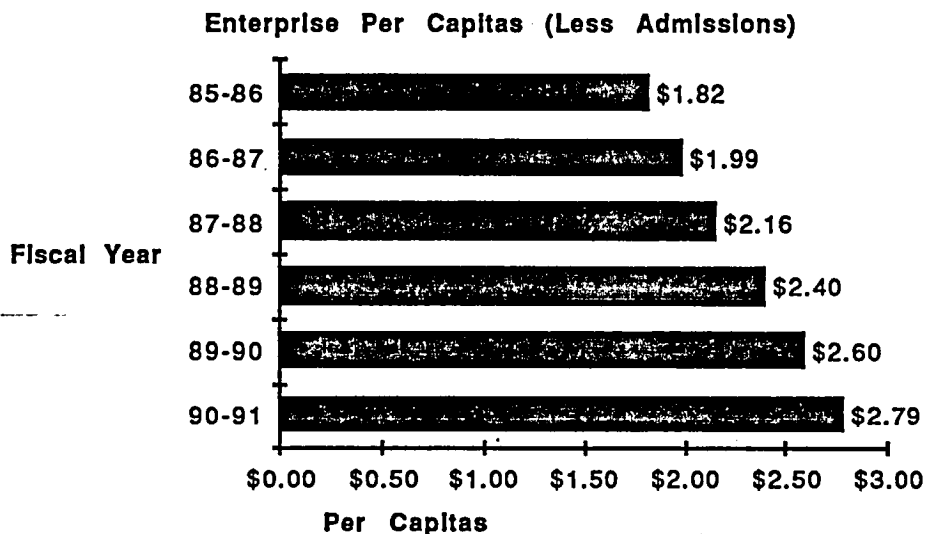
Admission revenue forecasts are based on the following preliminary schedule of fee increases:

<u>Effective Date</u>	<u>Adult</u>	<u>Youth/Seniors</u>
Current Fee	\$2.50	\$1.25
January 1, 1988	\$3.00	\$1.50
January 1, 1990	\$3.50	\$1.75

It is assumed that adult and youth/senior admissions will remain at the historical 2:1 ratio.

**C. Per Capita Enterprise Revenue Excluding Admissions**

Per capita revenues for food, gifts, railroad and other services are expected to rise as a result of increased attendance and longer stays in the Zoo because of more things to do and see. Per capita revenues are projected to rise as shown on the following graph..



**D. Inflation**

Based on a review of local and national economic trends, an inflation factor of 4 percent has been built into projections for expenditures and major enterprise revenues, excluding admissions.

**E. Personal Services**

Forecasts for personnel are based on current staffing levels plus new positions that will be required for additional programming. New exhibits, increased food services, more pathways and landscaping will require additional personnel in Animal Management, Visitor Services and Buildings and Grounds. Higher attendance levels and new programs will require new personnel in Educational Services as well.

It is anticipated that new facilities, coupled with more varied services and events and longer stays in the Zoo will aid in achieving the enterprise revenues necessary to meet the Council's policy of meeting 50% of operating costs from non-tax sources.

**F. Materials and Services**

While certain material and service costs such as merchandise for resale are directly related to Zoo attendance, other costs like those for utilities and those associated with an expanding animal collection are not that related to attendance. For the last several years material and service costs have increased an average of 8.8% per year. It is assumed this rate will continue.

**G. Capital Outlay**

Capital Outlay is projected to increase from 441,854 in 1986-87 to 494,324 in 1990-91. The Zoo plans to carry out a continuing facility improvements program during these years to upgrade utility systems, replace roofs, and replace equipment, etc.

**H. Policy Assumptions**

The following policy assumptions are incorporated in the Zoo budget forecast for the next five fiscal years.

- I. That property taxes collected will fund approximately fifty percent of operation and maintenance costs (personal services, materials and services, capital outlay, and transfers to the Insurance, Building and General Funds). Conversely, that non-property tax revenues - principally enterprise revenues - will fund the other approximately fifty percent of these same costs and that the Council will annually review admission fees to meet this objective. The table below shows the non-tax revenues as a percent of operations and maintenance as found in the projections.

<u>Projections</u>	<u>86-87</u>	<u>87-88</u>	<u>88-89</u>	<u>89-90</u>	<u>90-91</u>
Operations & Maint. Costs, incl. Insurance, Building and General Fund Transfers	\$7,122,203	\$7,478,795	\$8,019,759	\$8,493,089	\$8,888,942
Non-tax Revenue	\$3,470,878	\$3,577,520	\$4,024,035	\$4,441,762	\$4,853,433
	49%	48%	50%	52%	55%

2. That the Zoo's budget will provide for an unappropriated balance each year sufficient to balance the budget for the following year and assure cash flow from July 1 to tax collection time in November and that the budget will also provide a contingency line item equal to 3% of projected operating costs including the transfers. While the contingency is listed, it is assumed not to be spent and is included in the following year's fund balance.
3. That revenue in excess of operating needs will be transferred to the Capital Improvement Fund to assist with the implementation of the Zoo Master Plan.
4. That the Council will approve for implementation a sequence of projects found in the Zoo Master Plan and a method of funding them.

### FIVE YEAR OPERATING NEEDS

The five year needs for operating the Zoo are shown in Tables I and II (pages 8 through 10). Table I provides a summary of the expenditure requirements for the Zoo's six operating divisions: Administration, Animal Management, Buildings and Grounds, Education, Public Relations, and Visitor Services plus the various transfers. Table II summarizes the resources needed for these expenditures.

#### Expenditures:

Personal Services - As indicated in Table I, Personal Services is the largest category of expenditure for operating the Zoo, constituting an average 51% of the four principal expenditure categories. It is projected that Personal Services will increase at an average rate of approximately 5.5% per year through FY 1990-91. This increase is attributable to inflation and projected increases in the number of positions in Animal Management, Buildings and Grounds, Visitor Services and Educational Services.

The opening of Africa Bush in 1988-89 will require an additional keeper. This is because the Africa Bush exhibit will house more species of animals in a more complex facility than presently is true of the paddocks area.

In Buildings and Grounds there will be a need for an additional four FTE positions. These positions will help keep up with additional service demands created by increased attendance, more special events, and new facilities which will be more complex and labor intensive for maintenance and upkeep. These facilities include the major capital projects that are scheduled from 1987-88 through 1990-91 (Education/Administrative Center, Africa Bush I, II and III, and the East Bear Grotto).

Visitor Services and Educational Services will also be impacted. Visitor Services will need to expand its workforce as the Africafe and picnic areas come on line to serve more visitors and the Education/Administration Center will allow the Educational Services Division to increase its programs. Increased revenues from these sources are anticipated to more than offset operating costs.

Materials and Services - Materials and Services expenditures are the second largest item in operating the Zoo. This category constitutes an average of 31% of the operating budget and is projected to increase at an average rate of about 8% per year through 1990-91. This is attributable primarily to projected inflation plus increases for utility costs for new facilities and merchandise for resale to an increasing number of visitors.



Capital Outlay - The increase in capital outlay provides for necessary facility and equipment maintenance scheduled for this period. Capital outlay is only 6% of the Zoo's operating budget.

Transfers to the Insurance, General, and Building Funds - The Insurance Fund transfer pays that coverage for direct Zoo services such as liability insurance and the Zoo's proportionate share of other insurance requirements. The General Fund transfer is mainly for the purchase of services from the District's support service divisions. Included in support services are budget, accounting, personnel, data and word processing and printing. This transfer is based on a cost allocation policy and projected to increase according to the anticipated inflation rate of 4% annually. Actual future costs could vary plus or minus if the policy is modified. The Building Fund includes a proportionate share of the Metro office complex.

#### Revenue:

Table II (page 10) shows projected operating revenues and capital improvement transfers for the Zoo from FY 1986-87 to FY 1990-91. It is anticipated that the Zoo's enterprise revenues (admissions, food and concession sales, railroad fees, etc.) will increase from \$3,227,750 in 1986-87 to \$4,684,390 in 1990-91. Although part of this increase will come as a result of the number of Zoo visitors increasing and staying in the Zoo longer, it will be necessary for the Zoo to adjust the prices charged for its services, including admission fees. The Council should review admission fees annually and it should be noted that admission revenue projections are based on increases in fees on January 1, 1988 and 1990. Patrons will be receiving considerably more value for their fees as projects noted earlier are completed.

The tax figures shown in Table II are the amounts required to balance the projected budgets.

#### ZOO MASTER PLAN IMPLEMENTATION

To serve as a guide in making decisions for future capital improvements at the Zoo, the Council adopted a Zoo Master Plan in December 1983. That plan established several high priority projects that have been built or are in the process of being bid. The remaining projects are being reviewed and possibly modified. Schedules will be established when the Council approves an updated plan late next spring. Meanwhile, staff has recommended two major projects for funding under the next three years combined operations and capital improvements serial levy. These are Phase III of Africa Bush and the remodel of the East Bear Grotto.

Major projects to be built during the next four years include:

Africa Bush Phases I and II, to be financed with funds carried forward from the current year capital budget. This project will include, in addition to the animal exhibits, a new main food facility and improvements to the current concert lawn area.

Africa Bush III, which will include an upgraded electrical service for the lower side of the Zoo and exhibit space for such animals as lions, baboons, rock hyrax, gerbils, badgers, and spotted hyena, to be financed with new levy funds.

Completion of the Education/Administration Center, which will be financed with funds carried forward in the current budget.

Remodel of the East Bear Grotto to complement the work done on the West Bear Grotto. This project will primarily house bears such as spectacle or sloth bears, but might also include other species. This project is to be funded from the new levy.

As indicated above, a significant part of the projected capital improvement expenditures will be financed with funds carried forward in the Capital Improvements Fund. The projected Capital Fund balance at the end of this fiscal year is \$6,286,309 as indicated in Table III (page 11). Also shown are the projected revenues and expenditures for this fund for the years 1986-87 to 1990-91. The projection assumes no new levy for capital improvements for 1990-91. Decisions for that year and those following will be made after the Master Plan is updated.

TABLE I: OPERATING FUND REQUIREMENTS - FY 86-87 - 90-91

Levy Years					
PROJECTED ATTENDANCE	850,000	820,000	845,000	865,000	880,000
	86-87	87-88	88-89	89-90	90-91
	Revised Budget Estimate	Projected	Projected	Projected	Projected
OPERATING DIVISIONS					
Administration					
Personal Svcs.	\$241,605	\$258,113	\$274,792	\$289,948	\$305,050
Materials & Svcs.	\$240,735	\$145,408	\$151,440	\$225,215d	\$164,266
Capital Outlay	\$20,000	\$15,600	\$16,224	\$16,873	\$17,548
Sub-Total	\$502,340	\$419,121	\$442,456	\$532,036	\$486,864
Animal Management					
Personal Svcs.	\$1,176,532	\$1,218,795	\$1,298,809	\$1,359,770	\$1,418,987
Materials & Svcs.	\$218,100	\$217,776	\$238,817	\$256,919	\$267,196
Capital Outlay	\$17,800	\$14,352	\$19,252	\$17,773	\$18,484
Sub-Total	\$1,412,432	\$1,450,923	\$1,556,878	\$1,634,462	\$1,704,667
Buildings & Grounds					
Personal Svcs.	\$909,823	\$973,931	\$1,058,150	\$1,113,053	\$1,170,284
Materials & Svcs.	\$834,452	\$929,963	\$1,021,777	\$1,067,997	\$1,160,003
Capital Outlay	\$354,575	\$374,764	\$389,755	\$405,345	\$421,559
Sub-Total	\$2,098,850	\$2,278,658	\$2,467,682	\$2,586,395	\$2,751,846
Educational Services					
Personal Svcs.	\$372,403	\$437,844	\$463,078	\$488,648	\$513,665
Materials & Svcs.	\$79,094	\$96,720	\$102,833	\$106,946	\$111,809
Capital Outlay	\$4,725	\$5,200	\$5,408	\$5,624	\$5,849
Sub-Total	\$456,222	\$539,764	\$571,319	\$601,218	\$631,323
Public Relations					
Personal Svcs.	\$100,488	\$106,230	\$111,790	\$117,679	\$123,558
Materials & Svcs.	\$135,540	\$140,962	\$146,600	\$152,464	\$158,563
Capital Outlay	\$22,000	\$5,200	\$2,704	\$3,037	\$2,808
Sub-Total	\$258,028	\$252,392	\$261,094	\$273,180	\$284,929

TABLE I: OPERATING FUND REQUIREMENTS (CONT.) - FY 86-87 - 90-91

## Levy Years

Visitor Services					
Personal Svcs.	\$714,105	\$757,769	\$788,080	\$819,603	\$852,387
Materials & Svcs.	\$602,410	\$651,695	\$738,616	\$818,370	\$898,353
Capital Outlay	\$22,754	\$29,120	\$43,264	\$26,997	\$28,077
Sub-Total	\$1,339,269	\$1,438,584	\$1,569,960	\$1,664,970	\$1,778,817
Total All Divisions	\$6,067,141	\$6,379,442	\$6,869,389	\$7,292,261	\$7,638,446
OPERATING TRANSFERS	FY 86-87	FY 87-88	FY 88-89	FY 89-90	FY 90-91
Building Fund	\$93,581	\$97,324	\$101,217	\$105,266	\$109,477
General Fund	\$497,274	\$517,165	\$537,852	\$559,366	\$581,740
Insurance	\$256,764	\$267,035	\$277,716	\$288,825	\$300,378
Sub-Total	\$6,914,760	\$7,260,966	\$7,786,174	\$8,245,718	\$8,630,041
CONTINGENCY	\$207,443	\$217,829	\$233,585	\$247,371	\$258,901
Sub-Total	\$7,122,203	\$7,478,795 <sup>a</sup>	\$8,019,759	\$8,493,089	\$8,888,942
UNAPPROPRIATED BALANCE	\$916,048	\$820,197	\$830,894	\$819,685	\$600,000
TRANSFER TO CAPITAL FUND	\$2,316,920	\$1,902,019	\$1,716,408	\$1,698,467	\$178,883
Total Expenditures	\$10,355,171	\$10,201,011	\$10,567,061	\$11,011,241	\$9,667,825
SUMMARY:					
Personal Services	\$3,514,956	\$3,752,682 <sup>b</sup>	\$3,992,699 <sup>c</sup>	\$4,188,701	\$4,383,931
Materials & Services	\$2,110,331	\$2,182,524	\$2,400,083	\$2,627,911	\$2,760,190
Capital Outlay	\$441,854	\$444,236	\$476,607	\$475,649	\$494,325
Transfer to Building Fund	\$93,581	\$97,324	\$101,217	\$105,266	\$109,477
Transfer to Support Svcs.	\$497,274	\$517,165	\$537,852	\$559,366	\$581,740
Transfer to Insurance	\$256,764	\$267,035	\$277,716	\$288,825	\$300,378
TOTAL OPERATING EXPENSE	\$6,914,760	\$7,260,966	\$7,786,174	\$8,245,718	\$8,630,041
a - Expenditures are projected on the basis of changes in programs and 4% inflation beginning in 1987-88.					
b - Includes additional education/graphics staff and maintenance workers.					
c - Includes additional animal keeper and maintenance workers.					
d - Includes election cost.					

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

Levy Years					
PROJECTED ATTENDANCE	850,000	820,000	845,000	865,000	880,000
	86-87	87-88	88-89	89-90	90-91
REVENUE PROJECTIONS	Rev. Budget Est.	Projected	Projected	Projected	Projected
Fund Balance	\$1,732,343	\$1,123,491 <sup>b</sup>	\$1,038,026	\$1,064,479	\$1,067,056
Taxes Current	\$4,691,950	\$5,005,000	\$5,005,000	\$5,005,000	\$3,247,336 <sup>c</sup>
Taxes Prior Year	\$460,000	\$495,000	\$500,000	\$500,000	\$500,000
ENTERPRISE REVENUES					
Admissions	\$1,419,500	\$1,506,340 <sup>a</sup>	\$1,693,380	\$1,877,915 <sup>a</sup>	\$2,057,440
Food Service/Vending	\$1,062,500	\$1,100,112	\$1,279,533	\$1,410,861	\$1,544,213
Gift Shop	\$340,000	\$375,232	\$429,557	\$486,504	\$545,622
Railroad	\$272,000	\$281,424	\$301,604	\$330,823	\$350,022
Rentals	\$17,000	\$16,400	\$16,900	\$17,300	\$17,600
Sale of Animals	\$10,000	\$15,000	\$10,000	\$10,000	\$15,000
Education Fees	\$58,850	\$68,750	\$78,000	\$86,250	\$96,000
Miscellaneous	\$47,900	\$52,000	\$54,080	\$56,243	\$58,493
SUB-TOTAL ENT. REV.	\$3,227,750	\$3,415,258	\$3,863,054	\$4,275,896	\$4,684,390
Interest Income	\$127,628	\$84,262	\$77,852	\$79,836	\$80,029
Zoo Parents	\$32,500	\$33,800	\$37,856	\$39,370	\$40,945
Donations	\$54,000	\$15,200	\$16,273	\$17,660	\$19,069
Grants	\$25,000	\$25,000	\$25,000	\$25,000	\$25,000
Sale of Equipment	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000
SUB-TOTAL	\$243,128	\$162,262	\$160,981	\$165,866	\$169,043
TOTAL REVENUE	\$10,355,171	\$10,201,011	\$10,567,061	\$11,011,241	\$9,667,825
a - Assumes Fee Increase on January 1, 1988 and January 1, 1990.					
b - Includes previous year unappropriated balance plus contingency.					
c - Assumes no levy for capital improvements.					

TABLE III: CAPITAL IMPROVEMENT FUND REQUIREMENTS AND RESOURCES - FY 86-87 - 90-91

## Levy Years

	86-87	87-88	88-89	89-90	90-91
<b>EXPENDITURES</b>					
Alaska Tundra	\$80,000	\$30,000			
Elephant Museum	\$284,246				
Electrical Upgrade				\$500,000	
Misc. Impr. & Exhibit Dev.	\$30,000	\$115,000	\$115,000	\$115,000	\$115,000
Africa Bush I and II	\$1,500,000	\$5,130,790	\$1,070,000		
Education/Admin. Center	\$500,000	\$376,136			
West Bear Grotto	\$100,000				
Update Master Plan	\$100,000				
Africa Bush III		\$280,000	\$1,700,000	\$1,759,550	\$50,000
East Bear Grotto			\$100,000	\$600,000	\$700,000
Construction Manager	\$47,166	\$49,525	\$52,001	\$54,601	\$57,331
<b>TOTAL</b>	<b>\$2,641,412</b>	<b>\$5,981,451</b>	<b>\$3,037,001</b>	<b>\$3,029,151</b>	<b>\$922,331</b>
Unappropriated Balance	\$6,286,309	\$2,783,350	\$1,746,508	\$621,812	
<b>TOTAL EXPENDITURES</b>	<b>\$8,927,721</b>	<b>\$8,764,801</b>	<b>\$4,783,509</b>	<b>\$3,650,963</b>	<b>\$922,331</b>
<b>REVENUES</b>					
Beginning Fund Balance	\$5,878,498	\$6,286,309	\$2,783,350	\$1,746,508	\$621,812
Donations/Bequests	\$225,000	\$75,000	\$75,000	\$75,000	\$75,000
Interest	\$462,303	\$471,473	\$208,751	\$130,988	\$46,636
Transfer - Operating Fund	\$2,316,920	\$1,902,019	\$1,716,408	\$1,698,467	\$178,883
Other	\$45,000	\$30,000			
<b>TOTAL REVENUES</b>	<b>\$8,927,721</b>	<b>\$8,764,801</b>	<b>\$4,783,509</b>	<b>\$3,650,963</b>	<b>\$922,331</b>



8.2 Consideration of Resolution No. 86-718, for the Purpose of Appointing an Agent of Record for Casualty and Liability Insurance

Ed Stuhr, Grants and Contracts Officer, discussed the role of the agent of record, staff's selection process and recommended the firm of J.B.L. & K. Insurance be designated as agent. Responding to Councilor Frewing's question, he explained the agent would be paid via commissions for insurance coverage.

Motion: Councilor DeJardin moved to adopt the Resolution and Councilor Gardner seconded the motion.

Vote: A vote on the motion resulted in all twelve Councilors voting aye.

The motion carried and Resolution No. 86-718 was adopted.

8.3 Consideration of Resolution No. 86-714, for the Purpose of Submitting Metropolitan Service District Zoo Serial Levy

Donald Carlson, Deputy Executive Officer, noted a public hearing on the proposed ballot title had been conducted at the December 11, 1986, Council meeting and that staff had presented a full report on the Resolution at that meeting. He then distributed an amended ballot explanation as suggested by the Tax Supervising & and Conservation Commission (TSCC). He explained the revision would clarify allocation of funds between capital projects and operating needs. General Counsel had reviewed the change.

Motion: Councilor Kelley moved to adopt the Resolution and Councilor Collier seconded the motion.

Vote: A vote on the motion resulted in all twelve Councilors voting aye.

The motion carried. A discussion followed about whether the motion had clearly included adoption of the revised ballot explanation. Councilors Kirkpatrick and Collier made a second motion to clarify what was specifically being adopted.

Motion: Councilor Kirkpatrick moved to adopt Resolution No. 86-714 to include the revised language of the ballot explanation as submitted to the Council on the documents marked 6713C/467 and 6645C/485. Councilor Collier seconded the motion.

Vote: A vote on the motion resulted in all twelve Councilors voting aye.

The motion carried and Resolution No. 86-714 was adopted.

8.4 Consideration of Resolution No. 86-715, for the Purpose of  
Entering Into an Intergovernmental Agreement and Expending  
Funds to Preserve the Southern Pacific Right-of-Way (Jefferson  
Street Branch) Between Portland and Lake Oswego

Councilor Gardner presented staff's report and reviewed the history of events leading up to the recommendation of the Resolution. He reported land owners in the Johns Landing area did not support this action because of the potential for noise.

Councilor Cooper asked if Metro's charter allowed for purchase of railroad right-of-ways. Eleanore Baxendale, General Counsel, replied such an action would be allowed.

Motion: Councilor DeJardin moved the Resolution be adopted and Councilor Hansen seconded the motion.

Councilor Gardner explained the Resolution would not obligate Metro to purchase the right-of-way but would create a situation where the property could not be sold to another party for one year. This would allow time to explore all options further, he said.

Councilor Frewing asked if adoption of the Resolution would prevent future use of the land as a bike path. Councilor Gardner replied it would not.

Councilor Ragsdale said he would support the Resolution given its interim nature. He cautioned linear land parcels traditionally had low market value and that land prices should be examined very closely before any purchase was made.

Vote: A vote on the motion resulted in all twelve Councilors voting aye.

The motion carried and Resolution No. 86-715 was adopted.

8.5 Consideration of Resolution No. 86-720, for the Purpose of  
Amending Resolution No. 86-696, Regarding Responses to Requests  
for Proposals for Compost Facility Services

Debbie Allmeyer, Solid Waste Analyst, reported Resolution No. 86-696 unintentionally omitted reference to sewage sludge compost markets and markets targeted for sewage sludges in the sixth resolve paragraph. Because both yard debris compost and sewage sludge compost were being marketed, both should be considered when evaluating marketing plans proposed by mixed waste compost processors, she explained.



# METRO

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

December 22, 1986

HAND DELIVERED

Ms. Vicki K. Ervin  
Director of Elections  
Multnomah County  
1040 S.E. Morrison Street  
Portland, Oregon 97214

Dear Ms. Ervin:

Enclosed please find the following documents necessary to file a serial levy tax measure for the Special election on March 31, 1987:

1. Metropolitan Service District Resolution No. 86-714, adopted by the Metro Council on December 18, 1986, which establishes the ballot title for the serial levy election;
2. Attachment "A" to the above Resolution; and
3. A completed "Notice of Measure Election" form.

If you have any questions, please call myself or Don Carlson

Sincerely,

A. Marie Nelson  
Clerk of the Council

amn

Enclosures

cc: Don Carlson  
Kay Rich

#### Metro Council

Richard Waker  
Presiding Officer  
District 2

Jim Gardner  
Deputy Presiding  
Officer  
District 3

Bob Oleson  
District 1

Corky Kirkpatrick  
District 4

Tom DeJardin  
District 5

George Van Bergen  
District 6

Sharon Kelley  
District 7

John Frewing  
District 8

Tanya Collier  
District 9

Larry Cooper  
District 10

Marge Kafoury  
District 11

Gary Hansen  
District 12

Executive Officer  
Rick Gustafson

RECEIVED  
DIRECTOR OF ELECTIONS

1986 DEC 22 PM 3:43

RECEIVED