



METRO

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Portland, OR 97201-5398
(503) 221-1646
Fax 241-7417

November 19, 1991

Ed Lindquist, Chair
Board of Commissioners
Clackamas County
807 Main Street
Oregon City, OR 97045

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Rena Cusma

Metro Council

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Presiding Officer
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Roger Buchanan
District 10

David Knowles
District 11

Sandi Hansen
District 12

Dear Commissioner Lindquist:

The attached schedules are the Metropolitan Service District's current forecasts for the "Nonschool Local Government Financial Needs Inventory for FY 1992-93."

Metro will be participating in the tax coordination planning meetings held by Clackamas, Washington and Multnomah counties. Bob Ricks will be representing us at the Clackamas County meeting on November 19, 1991.

Sincerely,

Jennifer Sims, Director
Finance and Management Information

JS:rs
Attc.

1128

cc: Bob Ricks, Senior Management Analyst
Larry Shaw, Senior Assistant Counsel

CLACKAMAS COUNTY

NONSCHOOL LOCAL GOVERNMENT FINANCIAL NEEDS INVENTORY FOR FY 1992-93

SCHEDULE A

Name of Government: Metropolitan Service District

1. REVENUE REQUIREMENTS - FY 92-93

a. Estimated Total Rev. Req. (Estimated Expenditures)	\$	<u>236,747,296</u>	
b. Est. Non-Property Tax Rev.	\$	<u>231,532,668</u>	
c. Prop. Tax Rev. Requirement (1a - 1b)	\$		<u>5,214,627*</u>

* Before loss of \$500,000 due to Measure 5 in lots over limitation.

2. PROPERTY TAX LEVY - FY 92-93

a. Est. Tax Base Levy	\$	<u>5,730,360</u>	
b. Est. Serial Levy	\$	<u>-0-</u>	
c. Est. Total Property Tax Levy (2a + 2b)	\$		<u>5,730,360</u>

3. PROP. TAX LEVY AUTH. - FY 91-92

a. Tax Base Authority	\$	<u>5,406,000</u>	
b. Serial Levy Authority	\$	<u>-0-</u>	
c. Prop. Tax Levy Auth. (3a + 3b)	\$		<u>5,406,000</u>

4. EST. ASSESSED VALUE - FY 92-93

a. Base Assessed Value	\$	<u>46,294,063,771**</u>	
b. New Const. A.V. (Cities Only)	\$	<u>-0-</u>	
c. Total Est. Assessed Value			<u>\$46,294,063,771</u>

** Assumes FY 91-92 + 3%

5. ESTIMATED TAX RATE - FY 92-93

a. Tax Rate (To be filled in by County)	\$	<u> /</u>	
		<u>\$1,000</u>	

6. COMPARATIVE DATA

	<u>Amount</u>	<u>Percent</u>
a. Increase/Decrease of FY 92-93 Tax base over FY 91-92 Tax Base Authority	\$ <u>324,063</u> (2a - 3a)	<u>6.0</u> % (6a Amt./3a)
b. Increase/Decrease of FY 92-93 Serial Levy over FY 91-92 Serial Levy Authority	\$ <u>-0-</u> (2b - 3b)	<u>-0-</u> % (6b Amt./3b)
c. Increase/Decrease Total FY 92-93 Property Tax Levy over FY 91-92 Total Property Tax Levy Authority	\$ <u>324,063</u> (2c - 3c)	<u>6.0</u> % (6c Amt./3c)

7. Does your jurisdiction intend to seek a new tax base for FY 1992-93?

Yes _____ No X

8. Does your jurisdiction intend to seek a new or increased serial levy for FY 1992-93?

Yes _____ No X

NOTES:

1. In addition to the ad valorem information requested above, your jurisdiction may be levying other taxes or charges that are subject to the Measure 5 Cap. If that is the case, please attach a separate piece of paper that indicates the amount of any such fees or charges you intend to levy in FY 1992-93, and the unit of assessment (and unit quantity) they will be provided in narrative form.

2. In addition to the information requested above, State law requires that each jurisdiction attach a brief description of options they are considering to achieve effective and efficient service delivery taking into consideration resource limitations.

Metropolitan Service District

Nonschool Local Government Financial Needs Inventory for FY 1992-93

Note 1:

No taxes or charges will be levied by the Metropolitan Service District in FY 1992-93 that are subject to the Measure 5 cap other than the ad valorem information contained in line 2 of Schedule A.

Note 2:

The following options are being considered by the Metropolitan Service District to achieve effective and efficient service delivery, taking into consideration resource limitations.

Metro is working with the Bureaus of General Services, City of Portland, and with Multnomah County, to evaluate potential effectiveness gains through the sharing of office services and building services.

Metro is continuing the consolidation process of the Metropolitan Exposition Recreation Commission transferring responsibility for regional spectator facilities from the City of Portland to Metro.

Metro is working with Multnomah County to evaluate potential effectiveness benefits of transferring management of some county parks to Metro.

Metro and the Arts Commission are evaluating potential effectiveness benefits of combining the Commission with Metro.

CLACKAMAS COUNTY

NONSCHOOL LOCAL GOVERNMENT FINANCIAL NEEDS INVENTORY

SCHEDULE B - SERIAL LEVY DETAIL

Name of Government: Metropolitan Service District

For Fiscal Year: FY 1991-92

<u>Serial Levy Name</u>	<u>Year Effective</u>	<u>Year Expired/s</u>	<u>Amount</u>	<u>Prior Year's Authority</u>	<u>For Rate Serial Levie APPROVED RATE FY 92-93</u>
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None subject to Measure 5.

NOTES:

1. List each separate levy by name and provide the requested information.
2. Complete a separate Schedule B for each fiscal year in which your jurisdiction levied or expects to levy a serial levy.

CLACKAMAS COUNTY
 ESTIMATED TAX TO BE LEVIED FOR BONDED DEBT SERVICE
 SCHEDULE C

<u>Existing Bond Issues</u> <u>92-93 Amount Required</u>	<u>Estimated 92-93 Assessed</u> <u>Valuation of District</u>	<u>92-93</u> <u>Estimated Rate</u>
\$5,639,400	\$47,294,063,771	.1192/1000

<u>Proposed 92-93 Bond Issues</u> <u>92-93 Amount Required</u>	<u>Estimated</u> <u>92-93 A.V.</u>	<u>92-93</u> <u>Estimated Rate</u>
None		

Proposed 1993-94 bond issues (not adopted by the Metro Council but shown for information sharing and planning purposes only).

1. Metropolitan Greenspaces \$100 to \$200 million 20-year levy.
2. End of Oregon Trail Capital Project \$34.5 to \$42 million 20-year levy.
3. Spectator Facilities Capital Improvement \$10.3M to 12 million 10-year levy.

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

Memorandum

DATE: November 20, 1991

TO: Jennifer Sims, Director of Finance & Management
Information

FROM: *RSR* Bob Ricks, Senior Management Analyst

REGARDING: SB 1185

Last night I represented Metro at the Clackamas County meeting on "nonschool local government financial needs inventory for FY 1992-93." Commissioner Judy Hammerstad initiated the meeting. Mike Swanson, Chief Executive Officer, made an informational presentation. The Clackamas County legislative lobbyist was also there and gave us a flavor of the process of passage of this bill. The following points were made:

- The purpose of the act is to encourage nonschool local governments to cooperatively review and resolve local service delivery and financing issues in response to the limitations of Measure 5
- The bill is currently in effect and has the "sunset" provision. It applies to any taxing measure submitted to the electors for approval or rejection at an election held on or before January 1, 1994.
- During the life of this bill, four key actions are required to place a measure proposing a new or increased tax on the ballot.
 - Each unit of government shall designate a person who is to receive the notice required under this section. That person shall serve as the representative of the unit of local government in developing the tax coordination plan. (I have attended the tax coordination plan meeting for Clackamas County, taking care of this requirement. I am scheduled to attend the required meeting for Washington County, and the Multnomah County meeting date is yet to be set.)
 - Each tax coordination plan shall consist of a financial needs inventory as defined in the act. (I have provided an inventory acceptable to Clackamas County. An inventory is being prepared on forms provided by Washington and

MEMORANDUM

November 20, 1991

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Multnomah county and will be presented to them at their tax coordination plan meeting.)

- o A public hearing shall be held at least 30 days prior to the date the measure is filed with the election officer. The notice and public hearing requirements shall be in addition to any other notice and hearing requirements provided by law. (Any affected district should probably receive an individual notice even though the law is not specific. There might be a loophole for us in a under Section 8 which refers to an ORS 294.430(4) alternative using the Tax Supervising and Conservation Commission, but it would require legal opinion.)
- o When the governing body of a unit of local government files a measure proposing a new or increased tax with the election officer, the governing body must certify to the election officer that the governing body has complied with sections 2 to 8 of this act or the election officer shall not place the measure proposing the new or increased tax upon the ballot. (This requires a form certifying that the three prior requirements have been met.)

Clackamas County staff will compile the data provided at the meeting and send the participants the data and information on which bodies within the county are facing compression under measure 5. There will not be many bodies under compression in either Clackamas County or Washington County, but Multnomah County will have a substantial quantity.

cc: Dick Engstrom
Don Carlson
Betsy Bergstein
Ken Gervais
Larry Shaw