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Report in Metropolitan Service District Zoo Serial Levies: METRO Measure 26-10 and METRO Measure 26-11

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**REPORT ON
METROPOLITAN SERVICE DISTRICT ZOO SERIAL LEVIES**

METRO Measure 26-10 ("A" Ballot)

**SERIAL LEVY, PARTIALLY STATE FINANCED,
FOR BASIC ZOO OPERATIONS**

Purpose: This levy authorizes the Metropolitan Service District to serially levy \$1,456,923 annually for three years for a total of \$4,370,769 property tax outside the six percent limitation specified in the Oregon Constitution. Proceeds would be used entirely to support operations and maintenance of the Zoo. No portion would be used for capital construction.

METRO Measure 26-11 ("B" Ballot)

**SERIAL LEVY, WITHOUT STATE FINANCING,
FOR ZOO OPERATIONS AND EXHIBITS**

Purpose: This levy authorizes the Metropolitan Service District to serially levy \$3,543,077 annually for three years for a total of \$10,629,231 property tax outside the six percent limitation specified in the Oregon Constitution. Proceeds from the levy would be used entirely to support operations and capital construction at the Zoo.

To the Board of Governors,
City Club of Portland:

I. INTRODUCTION

A \$10 million, five-year special tax levy authorized by the voters in May, 1976, for operations, maintenance and capital improvements at the Washington Park Zoo, under the aegis of the Metropolitan Service District (METRO), expires at the end of June, 1981. Replacement funding is now sought by METRO:

1. To continue the operations and maintenance of the Zoo.
2. To carry out some extensive capital improvements to the facility.

To clarify the nature and impact of these levy proposals, it should be noted that the 1979 Oregon Legislature took certain actions with regard to state property tax relief for levy measures as follows:

1. The amount of the relief is set at 30%.
2. It is available only for operational expenditures.
3. It is available for the current level of levy expenditures adjusted for inflation.
4. No inflation adjustment is available for a mixed operational and capital levy. (The 1976 Zoo levy was a mixed one.)
5. The state property tax-supported part of a levy must be presented separately as an "A" ballot to support operational costs only.
6. Additional operating funds and capital funds must be submitted to the voters as a separate item (a "B" ballot).
7. The "A" ballot must pass before an approved "B" ballot can take effect.

8. The "A" ballot can be voted on as often as elections are held, but the "B" ballot can be presented to the voter for approval only twice after the approval of the "A" ballot.

9. The defeat of the "B" ballot in any year does not prevent the taxing unit from presenting an identical proposal to the voters in a subsequent year in conjunction with a new "A" ballot.

The "A" ballot measure (26-10) authorizes METRO to serially levy \$1.46 million annually for three years with the proceeds to be used entirely to support operations and maintenance of the Zoo. The "B" ballot (26-11), which does not qualify for state tax relief, authorizes METRO to serially levy \$3.54 million annually for three years to be used entirely for operations and capital construction at the Zoo. Of the "B" ballot amount, \$2.3 million annually is intended for capital construction and the remaining \$1.24 million is intended to complement the \$1.46 million from the "A" ballot for operational purposes.

According to METRO's Management Services Director, it is estimated that the costs of the levy proposals (both "A" and "B"), if enacted fully by the voters with state tax relief for part of ballot measure "A," will be approximately \$9 per year per \$50,000 of taxable value. The cost of the present levies, which expire in 1981, is approximately \$4.50 on a \$50,000 home.

II. HISTORY

No better history of the Zoo, since its beginnings almost 100 years ago, can be found than that contained in the City Club report on "Portland Municipal Zoo" (March 23, 1951, Vol. 31, No. 46). The Portland Zoo in its present form had its genesis in the report of that City Club Committee. The following is a portrait of the "modern" Zoo.

Although the Zoo originally began in the mid 1880s, the Zoo in its present location opened July 3, 1959, as the Portland Zoological Gardens. The major turning point for the present Zoo began after City Club Committee recommendations were presented to the City Council calling for a new Zoo to be constructed on a new site, establishment of an advisory group, and formation of a commission to aid in Zoo matters. The recommendations were followed by the creation of the Portland Zoological Society and by establishing the Portland Zoo Commission.

The Zoo Commission was appointed in 1952 and the City Council approved its recommendation for a \$3,850,000 bond issue to be placed on the November ballot to finance a new Zoo on the 40-acre site of the West Hills Golf Course in Washington Park. At that time, the Portland Zoological Society was chartered and its first task was to run the promotional campaign for the ballot measure. In May, 1954, the voters of the City of Portland adopted a five-year tax levy.

By the time of the opening of the Zoo, 60 percent of the first master plan was completed, forming the nucleus of the present Zoo. Through private contributions, the Children's Zoo (completed in 1961) and the Hospital/Research facility (completed in 1966) were made possible.

Full management of the Zoo was assumed by the Portland Zoological Society in 1971. In 1975, the Oregon Legislature passed laws allowing the Zoo to come under METRO's jurisdiction. In May, 1976, the voters approved a five-year, \$10 million levy for the continued operations, maintenance and capital improvement of the Zoo. In June, 1981, the present tax levy for the Zoo expires.

III. ARGUMENTS ADVANCED IN FAVOR OF THE MEASURES

The following is a list of arguments from various sources advanced in favor of the ballot measure, not listed in perceived order of importance.

1. In order to continue the operations of the Zoo and make capital improvements, renewed funding from some source will be required. An opinion survey, conducted by METRO in October, 1979, showed support for a levy for the Zoo alone exceeded support for other alternative mixes and types of financing by METRO.

2. Additional capital funding will allow Zoo management to focus greater attention upon certain geographical and ecological relationships of animals rather than continue disjointed collections of animals currently found at the Zoo.

3. Paid admission to the Zoo has been increasing, in part (probably) due to its improved attractiveness. Continuing increases in admission will depend upon the continued attractiveness of the Zoo.

4. The Zoo should be encouraged and supported in its efforts to interact more in the life of the general community, particularly in the education of the young. Since the inception of the 1976 funding, the Zoo's management has persevered with plans to visit each metropolitan area school.

5. The previous investment in the development of the Washington Park Zoo, in terms of capital, human resources and community efforts, should not be allowed to founder.

6. The City of Portland and the immediate three-county area has become a major metropolitan center of the United States, with tourism as one of its focal revenue sources. A well-run Zoo exhibit will prove to be a valuable asset to the region and will fit in well with the total cultural environment presented to tourists and residents alike.

7. The present management team at the Zoo, under the leadership of Director Warren Iliff has (a) improved the facility and should be supported in its future plans for the up-grading and expansion of the Zoo and (b) been responsible in its use of the present levy funding both for operations and capital expenditures. The continuity of this team is important to the Zoo's future operations; failure to provide sufficient funding may have a detrimental effect on the maintenance of such a team.

8. The regional method of financing through METRO if the Zoo's operations and capital expansion appears to be valid and supportable from attendance statistics.

9. In the past, various combinations of City of Portland funds and private funds have not been successful in maintaining a quality Zoo. Tax levy support from a wider regional electorate appears to be necessary; and, in turn, the presence of the Zoo will have a beneficial influence on the communities from which it derives its support.

10. With the ever increasing cost of travel and gasoline, growth and improvement of local education facilities, like the Zoo, should be encouraged.

IV. ARGUMENTS ADVANCED IN OPPOSITION TO THE MEASURES

The following is a list of arguments from various sources against the ballot measures, not listed in perceived order of importance.

1. The levy requests have not been well-enough documented to analyze and justify the proposed expenditures for operations and capital.

2. The level of expenditures proposed for the years 1981-84 appears to be in excess of the currently incurred expenditures for the operations of the Zoo.

3. This funding request should be presented to the voters as part of a permanent tax base for METRO.

4. Those persons using the Zoo facilities should support its operations rather than expect the taxpayers to provide the support.

5. The Washington Park Zoo is a Portland attraction and should be supported by Portland taxes.

6. The Zoo could continue to operate as an attractive exhibit without large capital expenditures.

7. Additional sources of revenue for the Zoo, other than taxes, have not been fully explored and utilized.

8. Fundamental opposition to METRO as a regional governmental body carries over into opposition for funding for the Zoo.

9. The status of the state's 30% support embodied in ballot measure "A" is uncertain due to the fact that the enabling legislation under House Bill 2540 is also before the voters in May, 1980.

10. The nature of the ballot measure "B," which contains some funds for operations and all of the funds for capital expansion, does not allow the voter the selection of either capital funds or operational funds. It is a "both" or "nothing" proposition.

11. The possibility of funds excess to needs raises questions about the ultimate disposition of these excess funds, if any, including the fear that they might be disbursed through other METRO activities.

V. DISCUSSION

A. Limitations

Your Committee was handicapped by the late passage on March 11, 1980, of the enabling ordinance by METRO to submit these levy proposals to the voters. This occurred after an Attorney General's opinion had been sought by METRO as to the amount that could be levied under ballot measure "A" (26-10). Notwithstanding the limitations of time, your Committee feels that it was able to develop a good understanding of Washington Park Zoo finances and is able to present this report with confidence in its conclusions. Those persons the Committee was able to interview were, by a large majority, in favor of the proposals. Your Committee did seek out contrary opinions; and, although we did find some witnesses in opposition to the funding, no organized opposition was found.

The committee wishes to acknowledge the fine assistance provided by Stephen B. Hill, the Chairman of the 1976 City Club report on the Portland Zoological Gardens.

B. General

Your Committee acquired data and set up interviews for the purpose of (1) appraising present Zoo management; (2) examining the financial management of the facility during the present five-year levy period; (3) relating the future plans and development for the Zoo in terms of its previous plans and the philosophy of Director Warren Iliff and his management team; (4) relating the 1981-84 proposed operational expenditures to the present level of operations and that immediately past; (5) examining paid admission trends and other enterprise revenue sources to see whether untapped revenue potential exists; (6) looking at the physical facilities to see what progress has been made and is in the making; (7) examining the concessions operations and planned enhancements; (8) looking at other financing possibilities for the Zoo and the alternatives if there is voter disapproval of these particular levy measures; (9) looking at the interaction financially between the Zoo and METRO; and (10) in the absence of organized opposition to these levies, interviewing some individuals who are in opposition and noting their rationale.

C. Major Issues

Zoo management is headed by Director Warren Iliff and Assistant Director McKay Rich and is organized into four divisions—Animal Management, Buildings and Grounds, Educational Services and Visitor Services. From our examination, it appears evident that the Zoo is in competent management hands with strong leadership operating under a long-range plan and adopting good financial controls.

From the financial data your Committee was able to obtain, it appears that the present levy monies are being spent generally as projected in the 1976 ballot measure materials. Attendance and other enterprise revenues have increased, probably exceeding the aspirations of 1976; and total operating costs have been less than projected, leaving more than the \$3 million for capital expenditures anticipated in 1976. There are still considerable funds being carried forward for capital expenditures expected to take place in the next year, including the remodeling of the Primate Area; and the total to be spent on capital outlays from the 1976 levy will be about \$4.5 million. Recently completed has been the renovation of the Elephant House and surrounding area, and any recent visitor to the Zoo will have recognized some improvements and redesign to the main entrance area and plaza.

(a) *Development Plans*

In the spring of 1977, the Metropolitan Service District Board adopted the recommendations of a study by ZooPlan Associates for the future development of the Washington Park Zoo. The purposes for the Zoo are stated as follows:

1. Providing the public with a recreational opportunity to view a variety of exotic, native and domestic animals exhibited alive in conditions that display their actual traits.
2. Encouraging the public to acquire accurate information about animals and to come to a true understanding of the complex relationships animals have with their environments, with each other, and with man.
3. Encouraging the conservation, protection and propagation of rare and endangered animal species in an increasingly industrial and urban world.
4. Providing an attraction for tourists and visitors by means of a diverse collection of animal life exhibited in ways that especially highlight the characteristic and environmental features which the citizens of this region prize so highly.
5. Engaging in a limited amount of humane animal research when the primary purpose is of benefit to animals, especially those in the Washington Park Zoo.

In more specific operational terms, the Washington Park Zoo administration has outlined a development plan for its three-year period beginning July, 1981. The major goals are stated to be:

1. Improving existing facilities at the Zoo before embarking on major new exhibits.
2. Concentrating on animal spaces providing more natural environments and more room, and eventually rounding out the collection to include reptiles and birds, and to include more native animals.
3. Making the Zoo a better educational experience.
4. Improving the facilities for visitor comfort and services.
5. Making certain there are adequate staff and facilities to maintain a quality institution.

In its "Fact Sheet Concerning the Washington Park Zoo and Regional Financing 1981-84," the Zoo has detailed 23 capital development projects, some of which will be started during the three-year period. The following groupings summarize the thrust of these capital outlays.

1. Projects designed to relocate and improve the entrance and entrance road to the Zoo with a beneficial effect on circulation patterns, administration and concession sales.
2. Establishment of various geographically-related exhibits representing the African Plains, Alaska, the Oregon Coast, Australia, Asia, South America and the Cascades.
3. Completion of projects underway, such as the Nocturnal Exhibit, the Primate House, and Elephant Hill.
4. Renovation work to the Bear Grottos and Penguinarium.
5. Added use of the train loop as an educational experience.
6. Addition of reptile, amphibian and ground bird exhibits.
7. Relocation of the Children's Zoo.
8. The improvement of the commissary, maintenance and research facility.

It is obvious from a tour of the present facilities at the Zoo that improvements have been made since 1976 to the layout and to the attractiveness of the exhibits. Of particular note is the Nocturnal Exhibit, the Elephant House and Elephant Hill, the Siberian Tiger dens and the remodeled and improved entrance plaza. Substantial work has yet to be done in respect of the visual impression. This is allowed for in the capital improvement plans outlined above.

We found great enthusiasm by Mr. Iliff and his staff for these plans. In the words of Mr. Iliff, "The basic premise for the development of the Zoo is education as well as recreation and to be functional, recreational and aesthetic in nature, staying clear of the carnival-type atmosphere."

(b) *Expenditures and Revenues*

Your Committee examined the present level of expenditures, including those for the year ended June 30, 1979, and the trend of expenditures during fiscal year 1980. We found that the net expenditures after revenues were running below budget for both of these years and that, as a result, additional funds for capital expansion have been accumulated. We particularly found evidence of overbudgeting for materials and services. We used, as an aid to our process, audited statements for the Metropolitan Service District for the year ended June 30, 1979, as well as the current year budget and expenditures through February 29, 1980. We also examined the budgets submitted in support of the levies. The Committee then developed sets of numbers composed from the base data extrapolated out into years 1981-84 with what it believed to be reasonable adjustments for inflation and expansion. It is here that we found disagreement between ourselves and the Zoo and METRO management.

From the operating expenditure levels of the years 1976-80 to the subsequent years through 1984, there is a quantum jump in operating budgets not fully explained to our satisfaction. In fact, the new levies would provide average annual amounts for operation almost twice those provided for in the 1976 levies and amounts for capital outlays at almost four times the rate. However, it was pointed out to us that certain federal and CETA grants received in past years cannot be counted upon to continue in the years beginning 1981. There will also be a necessary expansion in personnel to manage and maintain new exhibits and, of course, the omni-present threat of inflation. Your Committee believes that this is a generous budget and that the amounts included in ballot measure "B" (26-11) are likely to provide for amounts in excess of the \$2.3 million per year projected to be available for capital improvements.

Your Committee debated for some time on this question and specifically called a meeting with the Zoo and METRO management to check our findings. Although they did not agree with our conclusions, they do admit that there are likely to be some funds designated for operations that will become available for capital. We asked for and received assurances that such funds, if they do become available, would remain with the Zoo and not be siphoned off or disbursed through METRO for other purposes.

(c) *Attendance*

Listed below is the history of attendance at the Zoo since 1970, showing both paid attendance and total attendance. The paid attendance totals for 1972 and 1973 are missing from the records. One can derive from these numbers some favorable trends in the paid attendance category which reached the record level of 527,000 in 1979. Trends for this year suggest that attendance records may again be broken. At present, the Zoo operates with a dual admission price, one for residents within the Metropolitan Service District and a higher charge for those outside the District. It is estimated that approximately 50% of admissions is from within the District and 50% from outside.

ZOO ATTENDANCE

Year	Paid	Total
1970	486,477	738,502
1971	416,227	650,505
1972	—	594,961
1973	—	522,626
1974	372,939	474,124
1975	348,351	448,198
1976	471,468	641,639
1977	426,043	573,661
1978	438,602	551,237
1979	527,460	645,666

(d) Concessions and Special Programs

In the past years, the concessions and food facilities at the Washington Park Zoo have been criticized by some patrons. In connection with the levy request, it was argued that improved services provide added revenue to offset property tax costs. We explored this avenue, both with Zoo management and with an independent restaurant consultant. It appears that the new Visitors Services head at the Zoo, Gayle Rathbun, is aware of the deficiencies and is proposing changes to both the style and content of food sold and the methods by which it is sold.

Prices of food and refreshments at the Zoo have been virtually fixed for the past year or so, and revised menus will enable some upward movement in this pricing. The Zoo staff feels confident that it is more profitable providing their own concessions services rather than subcontracting to other vendors. They will be exploring the possibility of cross-training the people between the various concessions operations and the use of mobile food-vending vehicles. Mr. Rathbun also intends to improve the Zoo's cost accounting so that he can begin to target the profitability of his division.

John Cornyn, the restaurant consultant interviewed by the committee, believes there is good potential for increased revenues from the sale of food and refreshments and also believes the Washington Park complex could support a fine restaurant open year-round, perhaps on the Zoo premises. Zoo management is similarly considering that possibility in their long-range planning but not for the period of the next levy.

Mr. Rathbun also has some ideas concerning packaged tourist tickets which would, for instance, entitle a visitor to Portland to a day in Washington Park with privileges at OMSI, the Zoo, the Forestry Center and the Japanese Gardens, as well as food and the Zoo train. Such ideas will be explored further in concert with the management of the other Washington Park facilities. It certainly is the Committee's conclusion that concession revenue growth should outpace admissions revenue growth over the next few years, probably even more than has been budgeted.

(e) Zoo Financing

METRO set up a Finance Task Force charged with the responsibility of reporting on funding options for METRO, including the Zoo, for years following 1981. The task force considered a combined Zoo and general METRO levy, a separate Zoo and general METRO serial levy, and other options for placing separate serial levies on either the May or November, 1980, ballots. It similarly considered tax base proposals for both the Zoo and general METRO support or a tax base for either the Zoo or general METRO support on the May ballot and other options for tax base proposals on either the May or November ballot. It also considered any other combination of a serial levy or tax base for either the Zoo or METRO support. From its findings, including a public opinion poll, it concluded that a serial levy for the Zoo alone in May was the most attractive proposition for the voter. There appears to be strong community support for continued funding for the Zoo.

If the Zoo levies are not acceptable to the voters in May, METRO will have to consider its alternatives for the November ballot so that continuation of funding for the Washington Park Zoo could be made available beginning in July, 1981. If neither ballot measure "A" nor "B" passes in May and subsequent attempts to find voter support for funding fail, the Washington Park Zoo would be faced with very serious curtailments of its present services or even, in the final analysis, closure. If ballot measure "A" passes by itself, it is this Committee's opinion that the Zoo could continue to provide a good level of services to the community, but any hope for capital renewal or capital expansion would have to be postponed.

From the Zoo's budget each year an amount is allocated to management services provided by METRO for such things as accounting, budgeting and METRO services. This amount is shown growing from approximately \$200,000 in 1979 to \$350,000 for the year ended June 30, 1984.

(f) *Opposition to the Levies*

Your Committee attempted in its study to find individual or organized opposition to continuation of funding for the Washington Park Zoo under the umbrella of the Metropolitan Service District. Commissioner Stan Skoko in Clackamas County expressed his opinion that METRO funding should not be supported and that the METRO concept was not acceptable to his constituents; however, we found that Clackamas County Commissioner Robert Schumacher was supportive of the Zoo and its present arrangements. METRO Councilman Charles Williamson voted in opposition to the ordinance authorizing the levies because he felt that the Zoo and the Metropolitan Service District should be presented to the voter as one issue for total funding.

VI. CONCLUSIONS

Earlier in this report, we made note of the fact that the METRO ordinance facilitating the presentation of these levies to the voters was not voted on until March 11, 1980. The public should be provided more lead-time to examine and consider complex and important financial questions such as these. We recommend that METRO take this into consideration when considering the submission of future ballot measures. If more than one month had been available to your Committee, it would have delved deeper into the proposed capital expenditure budget and its priorities.

(a) *The "A" Ballot (26-10)*

It is the conclusion of your Committee that the "A" ballot (26-10) as presented is worthy of endorsement to support the operational costs of the Zoo. Our conclusions are based strongly on the following points:

1. The Zoo's growing attendance and source of attendance indicates the appropriateness of continued regional support.
2. The three-county area depends upon tourism for a significant part of its revenues. A thriving, well-run Zoo is an important support function to the tourist industry.
3. A levy measure at this time, separated from other activities of METRO, appears to be the best practical vehicle for financing available to the voter. It also provides the voters supporting the Zoo funding an opportunity to separate this question from that of a tax base support for the whole of METRO, which is likely to be before the electorate in November, 1980.

(b) *The "B" Ballot (26-11)*

Your Committee had much more difficulty with the "B" ballot for reasons provided under *Expenditures and Revenues* (above). We concluded that a recommendation for endorsement of the "B" ballot was called for by our findings but with a caveat that the operational budgets for fiscal years July 1981, to June 1984, could be overly generous by as much as \$300,000 to \$500,000 per year. After we shared our investigative work with METRO and the Zoo management at two meetings, we received assurances that any excess funds would remain with the Zoo and be used for future capital expansion. (The present levy has provided for capital outlays approximately \$1.5 million more than expected, because of savings on operations.) We direct your attention to the purpose of the "B" ballot quoted at the beginning of this report which states that "proceeds from the levy would be used *entirely* to support operations and capital construction at the Zoo" (emphasis added). We feel strongly that there is the need for better and more precise budgeting procedures to be established by the Zoo in concert with METRO. Present budgeting appears to be almost entirely based upon arbitrary, round-number percentage additions to previous budget bases and pays little attention to actual current trends of revenues and expenditures. The budgets, when proposed, should receive the scrutiny of a detailed budget review process, perhaps including a citizens' review board. These re-

views should cover both operational and capital expenditures and closely establish priorities.

Despite our stated reservations for the "B" ballot, we believe that (1) the Zoo's capital expansion plans are worthy of support; (2) that some part of the "B" ballot will be needed for operations and maintenance; (3) that the Zoo in the years ahead will serve a growing need for recreation and education close to home; and (4) that the Zoo is well managed by Director Warren Iliff and his staff and they have exercised prudence in their expenditures to this date.

VII. RECOMMENDATIONS

For voting purposes, we have divided our recommendations into two. Under the rules established by the Legislature, the "A" ballot can pass by itself without the "B" ballot, but the "B" ballot cannot be operative without the passage of the "A" ballot.

1. Your Committee recommends unanimously that the City Club support a "yes" vote on METRO measure 26-10 at the May 20, 1980, election.

2. Your Committee recommends unanimously that the City Club support a "yes" vote on METRO measures 26-10 and 26-11 at the May 20, 1980, election.

Respectfully submitted,
Gaye L. Buckmaster
R. Scott Clements
Carl Cottingham
Douglas R. Courson
Mary Ann Hague
E. Kimbark MacColl, Jr.
Gregory E. Niedermeyer
Ian McKechnie, *Chairman*

Approved by the Board of Governors on April 14, 1980 for publication and distribution to the membership for discussion and action on Friday, May 2, 1980.

APPENDIX A

PERSONS INTERVIEWED

John Archer, Chairman, Metropolitan Area Governments Committee,
 Portland Chamber of Commerce

John Cornyn, Restaurant and Lodging Consultant, Portland

Rick Gustafson, Executive Officer, Metropolitan Service District

Warren J. Iliff, Director, Washington Park Zoo

Francis J. Ivancie, Commissioner, City of Portland

Marjorie Kafoury, Chairman of the Board, Metropolitan Service District

Carol Lewis, Friends of the Zoo, Too

Jack Marks, Past Director, Washington Park Zoo

Senator Mike Ragsdale, Friends of the Zoo, Too

Jana Ragsdale, Friends of the Zoo, Too

Gayle Rathbun, Visitors Services, Washington Park Zoo

A. McKay Rich, Assistant Director, Washington Park Zoo

Robert Schumacher, Commissioner, Clackamas County, Oregon

Charles W. Shell, Director of Management Services, Metropolitan Service District

Stan Skoko, Commissioner, Clackamas County, Oregon

Charles Williamson, Council Member, Metropolitan Service District

APPENDIX B

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