

FILM/VIDEO TASK FORCE REPORT

Public Review Draft

March 8, 1990

prepared by the
City of Portland
Film/Video Task Force

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CITY OF PORTLAND

FILM AND VIDEO TASK FORCE

Task Force Members

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The Task Force would like to offer special thanks to Deloitte & Touche, Inc., for the assistance of Lynne Hendrix in preparing and conducting the survey of other cities.

II. INTRODUCTION

Creation Of The City Of Portland Film And Video Task Force

In December, 1988, City Council unanimously passed a resolution recognizing the importance of the film and video industry to the Portland metropolitan region and creating a City of Portland Film and Video Task Force.

The creation of the Task Force followed the release of a report, *Action Oregon, The Plan for Film and Video*, which had been reported to Governor Goldschmidt in September, 1988. That report, produced by the Oregon Film and Video Task Force, specifically recommended that local governments around the state organize their service functions in order to respond to the growth of the film industry and its needs.

The City of Portland Film and Video Task Force was charged with the following:

- Coordinate development of consistent policies, fees and procedures to assist in supporting the film and video industry.
- Develop recommendations for staffing that maximize the City's ability to provide an effective level of public service support to the industry.
- Work with other agencies in the region to assist in the promotion and development of consistent policies that support and advance the State's action plan for film and video.

Task Force Scope of Work

The primary intent of the report is to implement the directive given by Council in December, 1988, as defined above, and provide additional recommendations appropriate to define the role of the City of Portland in implementing the State strategic plan for film.

The report makes an attempt at providing Council with the framework to understand the uniqueness to the film industry in its relationship with local government and to define clearly an industrial development strategy for the City and the region.

This report makes no attempt to define specifically the economic impact of the Film and Video Industry in the Portland metropolitan region, though it reflects an awareness of the economic potential associated with becoming partners with the developing industry.

The report also is not intended to recreate the excellent work done by the Oregon Film and Video Task Force in developing a statewide strategic plan for increasing film production in Oregon.

Task Force Workplan

The basic workplan of the Task Force involved the following elements:

Information Gathering - The Task Force first surveyed all city bureaus with regards to past dealings with film representatives, existing policies related to film, and suggestions for changes in the city's approach to the film industry. The survey was followed by meetings with the individual bureaus.

The desired outcome of the bureau surveys and meetings was an improved understanding of the following:

- Relationship of our current policies to the needs of the film industry.
- Relationship of our current policies to those of other jurisdictions.
- Policy around which there is no disagreement and those around which additional discussion needed to occur.
- Recommendations for additional policy development.

Following the initial meetings with bureaus, the Task Force revisited each bureau's policies in order to make revisions prior to the development of a discussion draft.

The Task Force then sent survey forms to major competitive cities around the country to assess the components of film offices, policies, fees, etc. These surveys were followed up with telephone interviews with key city film offices having important, comparable development situations similar to Portland.

A Needs Assessment Survey of the local film industry operators was conducted. Finally, we compared our local Task Force vision with the recommendations of the State Film and Video Task Force.

Analysis Of Information - From the surveys of bureaus, other cities around the country, and the local film industry, options were identified for consideration regarding the roles of a Film Office in local government. These roles, once identified, were prioritized, and the various performance options around each role was identified.

From this discussion of roles, permit processing, fee structure, etc., the Task Force identified levels of service needed to support greater levels of local film/video activity. The Task Force identified three stages of film office support which could provide all appropriate, foreseeable public support, and also be flexible beginning with the most basic permit processing and prospect development functions.

In addition to defining potential film office roles, the Task Force identified other areas in which resources of the City of Portland could be harnessed to become a partner in the broader development of both the indigenous film industry and that from other film centers.

Development Of Recommendations

Recommendations were developed that encompassed the following areas:

- City of Portland Film and Video Mission Statement
- Film Office Industrial Development Policies
- Film Office Mission Statement and Film Office Recommendations
- Policy and Procedure Recommendations for Specific Bureaus

Preparation Of Review Draft

Public Comments

Preparation of Final Report for Council

III. SUMMARY OF RECOMMENDATIONS

Industry Situation and Vision for Portland

The Task Force recommends that Council recognize the large potential for growth of this industry in Portland. The growth stems from globalization of demand for American film and video programming, generally, and, specifically, from increasing environmental costs within traditional film centers in California to support increased production, causing Portland, and other cities close to Los Angeles, to experience increased demand as a production location. Portland will become the home for the mature professional who works anywhere world wide. Rapid technological change is serving to create new market segments and increase demand for film and video production world wide, and also make production companies more mobile and able to create high quality work away from the traditional Los Angeles base.

If Portland does nothing, production activity will continue to expand, but will do so with higher turbulence and distractions for City bureaus. If bureau functions are streamlined through the efforts of a Film Office, and if private investment establishes needed basic facilities now missing, then Portland could experience a major expansion and the appearance of a baseline industry.

Balanced growth depends upon having sufficient numbers of qualified workers to meet the needs of the 45 Portland companies who provide steady flow of business to advertisers, educators, cable and television broadcasters, both local and national -- plus having a labor and facilities pool adequate to support the occasional appearance of large out-of-state productions. The strategy to maintain balance between the competing industry needs must be developed and carried out by local private industry and labor organizations, with support from local government. The principal tools of the strategy will involve high quality technical education systems, which can create a working pool of high-quality entry level workers, and the appearance of a threshold level of sound-stage facilities adequate to support acceptable levels of film projects. Again, the key to the facility is high-technical excellence, which meets or exceeds the California standards.

Film Office - A Collection Of Roles

The Task Force recommends that Council establish of a "Film Office" that is, in reality, a collection of roles, some requiring staffing additions and others that are accomplished by current staff. These roles are clearly derived from the traditional duties of municipal government as they directly relate to interactions with a local industry which has an intrinsic need to operate in and through the public domain. Initially, the roles are managed in a decentralized fashion using existing officers of government. As support activities become more intensive, a need exists to centralize coordination of government functions, both within and between local governments.

Mission Statements for Local Government

The Task Force recommends that film and video industry mission statements be assigned to the City and to the Film Office as follows:

City of Portland

Wherein the City intends to benefit from the growth of the film industry and it recognizes that success is dependent upon the harmony of the relationship between City government, other local jurisdictions, and the film production community -- the City of Portland, its citizens and its employees, shall organize and operate its resources to become an efficient and competitive public partner to industry operatives. The City shall seek to become a favored production location which provides high quality labor resources, an effective industry support infrastructure, and the best possible climate of government cooperation.

Film Office Function

The Film Office serves as a public sector partner in promoting the development of the community interests related to the film industry. The Film Office has the mission to protect public property, insure public convenience, monitor public safety, and facilitate access to locations and labor in the Portland area, as related to film and video industry. The Film Office has the responsibility to implement code and city policy and to represent the interests of all sponsoring governments and agencies.

Formally Develop These Identified Roles In Three Stages

The Task Force recommends that the City formally develop the film office roles in phased stages. Each of three stage would incorporate increasing public sector responsibilities and services in response to clear successes and a supportable track-record of local industry activity. The responsibilities would be limited to those which are necessary and appropriate for government supporting the growth of local motion picture production activities. The appearance of a formal film office should await Second Stage developments, specifically when funding sources have been confirmed.

First Stage Development - Fully organize all existing public sector support functions within City government into a cohesive, consistent set of policies and procedures Publish these procedures widely in order to provide the local industry the benefit of efficient public sector operations. Use these policies and procedures to create a one-stop permitting process for the City of Portland.

The policy role, in the first stage, should continue to be played in the Mayor or Commissioner's office and require no additional staffing or funding.

Fix bureau responsibilities for permit functions and strengthen communications among the bureau representatives in order to facilitate the permit process. Streamline cost accounting and bureau reimbursement for permitted uses granted to the industry.

Assign central coordination of the permit processing structure to one FTE or equivalent. Where this FTE could serve the coordination function for the City of Portland and Multnomah County, establish communication channels and agreements between governments. The City should move forward in filling this FTE and initiate discussions with the County and other governments in the region to jointly pay for this position. The Task Force identified five optional arrangements detailing costs, office location, and advantages/disadvantages associated with each option for filling this position.

Establish a Film Office operating fund from public and private sources. Public funds would be derived from State and local governments which perceive benefit from motion picture activities within their jurisdiction. Private funds would be solicited from organizations directly supporting this industry and from tourist industry associations which provide transient and visitor housing, food, and entertainment to the motion picture crews. Within the parameters of this funding pool, move into Stage Two Development.

Second Stage Development - Develop a one-stop permit center, coordinated with all participating regional governments. Provide this center with communications capability and authority sufficient to respond to industry needs for rapid turn-around in the regional permit applications process.

Participate with the State marketing and recruitment functions to bring productions into the local area. Utilize existing marketing resources to promote the City for motion picture and commercial productions in Los Angeles.

Complement public sector functions with a private sector industry advisory council, which can provide advice and leadership on public sector issues relating to the film/video industry. Charter this group to identify and maintain the region's growth strategy, and to identify critical infrastructure and labor training need to foster optimal industry development within the region.

Sponsor planning within the local education and labor community to establish appropriate secondary, post-secondary, and vocational training programs in the motion picture industry. Actively recruit into the area appropriate colleges and vocational trainers of world class stature and reputation. Establish a training system which will feed locally trained workers into specialized apprenticeship programs.

Provide an outreach program to educate neighborhoods in Portland about motion picture productions. Assist these groups to become effective partners to feature film companies and others using area streets, houses and parks. Intercede to prevent and correct specific problems between residents and film producers.

Search for sources of public and private financing which can place substantial public investments and loans into the local industry to supplement private investment capital. This financing must, of course, be justified in all aspects according to normal financing terms and conditions. The basis for seeking out public resources is the historical absence of commercial lending programs to support an emerging film industry.

Based upon the attainment of favorable growth conditions in Portland, move into the Third Stage Development.

Third Stage Development - Assist the private sector in the development and operation of missing privately owned production facilities needed for industry growth.

Extend the Film Office marketing functions to levels now provided to indigenous Oregon industries including:

- Promotion of Portland to national and international producers, studios, and industry news media.
- Creation of an active marketing presence in Los Angeles, New York.
- Operation of an industry Ambassador program to host visitors to the region.

Cost Recovery Model And Experimental Five-Year No-Charge Permit Model.

The Task Force recommends that the City adopt a cost recovery model in the establishment of charges for film permitting.

In addition, Council is asked to authorize the Commissioner-in-charge of the Film Office to initiate discussions with the State of Oregon to establish a self-replenishing fund that would allow local governments to charge permit fees to this fund rather than to film producers. The goal of the recommendation is to establish a 5-year indigenous experimental program to determine the effect of no-cost permitting on expansion of the indigenous film industry.

Establish a Film Office Operating Fund

The Task Force recommends that Council authorize the Commissioner in charge of Film and Video to prepare a budget for the proposed Film/Video activity that includes participation from State government, other local governments, local tourist and promotional organizations, the private sector, and City general funds. The Commissioner should be authorized to discuss and negotiate the mutual interests of the Film Office with other funding participants in order to arrive at a commonly supportable program.

A plan for staffing, offices, fiscal control and on-going bureau coordination should be completed prior to the FY 91-92 budget cycle. The general range of the budget should include amounts necessary to cover First Stage goals and launch, if appropriate, Second Stage goals if the goals of the First Stage are attainable before the next budget period. The proposed budget should be entered into the next budget review process utilized by all activities of City government. Agreements with other funding participants should not be binding upon the City without Council approval.

Reimbursement To Bureaus

The Task Force recommends that Council establish a policy that allows for Bureau reimbursement for all charges made by that particular bureau on individual film and video projects.

Specific Bureau Policies

The Task Force recommends adoption by Council of the specific bureau policies that have been developed by the individual bureaus and the Task Force. In addition, the Task Force supports recommendations proposed by the bureaus that would assist in streamlining the permit process.

IV. INDUSTRIAL DEVELOPMENT STRATEGY

A. Industry Situation

The most recent census data indicates that the motion picture industry operates in virtually every large American city. This industry is composed of film producers and video tape producers, making motion pictures for exhibition at theaters, work places, and homes, or for programming on the television and cable networks. Distribution services are also a part of the industry, and serve to take American motion pictures into virtually every market in the world, supplying demand for entertainment, education, promotion and advertising markets. Finally, the industry also includes the production support companies who provide technical services to the producers. All together, there are over 11,200 distinct companies in the United States motion picture industry. Together they produce over \$19.9 billion of revenues and employ over 171,000 people. Even though 98% of the number of companies employ less than 100 people, the industry is considered to be dominated by large business. This view comes from fact that approximately seven industry conglomerates finance, produce, and distribute most of the major feature film production in the U.S. These companies are take-over targets because of their immense resources and inventories of film, which have taken over seventy years to assemble. Their capacity to provide highly desirable programming and feature films to a world audience has driven take-over bidding into the billions of dollars, a price well worth paying for foreign companies which now control equipment and communications technology.

California, with 4,146 companies, has 46% of all US firms and generates 57% of all motion picture revenues - \$11.8 billion of the total \$19.9 billion national total. New York is next largest with 16% of the companies and 16% of revenues. Illinois, Michigan, Florida, and New Jersey are very active in film production . Oregon, with 66 companies has .6% of the nations firms and creates revenues of \$33.8 million, or .2% of the industry total.

The average American production company generates \$1.7 million in receipts using the services of approximately 15 employees. The average pay per employee is approximately \$30,000 per annum. Portland hold approximately 42 companies, accounting for 60% of Oregon capacity. These Portland companies in 1987 together generated approximately \$21.5 million in revenue of the state's total of \$31.5 million. Most of this revenue was for local feature and television production, including commercials.

Most of Portland's companies produce for customers other than television, such as for corporate and education users. About a third of the production companies are oriented in television production. An important group of local firms, numbering about 12, perform services for producers. This last group significantly impacts the desirability of Portland as a location site for major feature film projects coming from California. It has been in this area that the most visible recent growth of Oregon's industry has occurred.

The State Film Office has developed estimates of in-state expenditures for feature films, made for television movies, cable movies, and other film and video projects, as follows:

1987	Portland Area:	\$ 5,000,000
	All Other Areas:	<u>970,000</u>
	Total	\$ 5,970,000
1988	Portland Area:	\$ 8,450,000
	All Other Areas:	<u>1,370,000</u>
	Total	\$ 9,820,000
1989	Portland Area:	\$16,520,000
	All Other Areas:	<u>1,050,000</u>
	Total	\$17,570,000

A listing of recent film activity in the state is found in Appendix C of this report.

This production business extends local production activity significantly, and places pressure on the local labor markets serving Oregon's indigenous employers. It is important to expand the supply of non-critical labor to support future growth in the out-of-state feature film segment.

The employment levels of local companies are stable and reliable. The growth rates of new jobs will be reflected by the industry's successes in landing more corporate communications and product commercials, television and educational programming, and feature film production. If more major production occurs locally, then Portland should expect to see in-migration of high-quality professionals from California and more competition for the time of local apprentice and journeymen workers. This latter element could be disruptive to local companies unless the industry continues to grow. Training in entry-level skills at the high school, college, and vocational training level is what is needed. A listing of the general job titles is found in Appendix B. of this report. A full job description of Motion Picture Production Employees is to be found in the report Job Descriptions and Training Outline for the Portland Film Industry, prepared by Portland Development Commission.

The magnitude of the training programs should be tied to expansion of work for indigenous companies and the appearance of outside productions. The appearance of growth in indigenous company work should be the leading indicator of industry expansion.

Production support services are provided by 12 companies in the Portland area. These companies currently provide services to the other 23 production companies, as well as other independent producers, public customers, or support to local retailers who meet photographic needs in the retail sector. The growth of out-of-state location shooting will increase the demand for services of these companies, but will also impact the services of the hotel, restaurant, building materials and transportation businesses in the area.

Budget data on the feature film industry shows that about 25% of a film's total cost is disposed on production services and labor. If most of the services and non-critical labor are drawn from the local area, then a major infusion of business occurs. The average major feature film has a \$20.6 million budget, meaning that Portland could benefit from up to \$5.0 million of business services for each major production coming in. Since most of the support services actually go to pay wages, there is an extraordinary circulation potential for this cash infusion. The region benefits far more than what would normally be the case.

B. Direction of Industry Trends

Four important trends are influencing the future disposition and course of the national motion picture industry:

Globalization - The world is coming to be a common market for entertainment and educational production. Most areas of the world now view movies and television. The American motion picture industry is the preeminent leader in the export of motion picture products. This stems from the overpowering cultural content of film and television programming, coupled to the leading role the United States enjoys as a cultural leader for many people of the world. The continued expansion of world markets for films and programming makes continued demand for local production a forgone conclusion.

Centralization - In the feature film segment, fewer companies are gaining more control of production. The small production companies are going through a shake-out where the weak disappear or become part of the remaining few companies. This process is driven by the infusion of very large amounts of cash resources to acquire intellectual properties, production capacity, inventory, talent, and distribution rights. Small companies cannot expect to control any part of the market. Even the largest are combining in order to protect foreign distribution rights into Europe and Asia. Local companies and talent must operate with respect to these large entities, not expecting to command a dominant or decisive influence on any part of the industry.

In other segments, the opportunity to flourish is based upon specialization. New niches are opening up as the feature film giants leave gaps which do not fit their larger game plans. Within these niches, a rich local industry of relatively small, agile, very creative companies can appear.

Technical Innovation - The pace of technical innovation in production and distribution of motion picture production is moving so rapidly that local competitive edges will be won or lost depending upon the connection with original equipment manufacturers and distributors. School training on equipment which may be several years old may be turning out people who cannot get jobs. Important changes in sound recording and picture definition are now occurring which will decisively reshape the location of preferred studios of the 1990's.

Environmental Costs - The high costs of living and doing business in Los Angeles and the high environmental cost of production, both to the individual professional and to the film producer, is reaching the critical level where mature firms and professionals are leaving the area. The traffic congestion and regulatory controls are destroying the ability of a producer to manage production in a predictable manner, where location shooting is required. Housing costs and availability are making Los Angeles a difficult place to live and raise a family. These high costs place enormous pressure on employers to pay higher wages to the non-critical workers. Getting to work will become increasingly difficult and more dramatic as efforts to reduce air pollution place limitations on freeway use.

The formation of Portland's industry strategy will accommodate and build upon these four trends. These trends will illuminate the area where Portland can grow and succeed, as well as identify areas where the local industry could become at risk.

C. Industrial Relations to Local Government

The industry places a unique requirement on the public sector. A great deal of production occurs in the public domain. Uniquely, much of the value of production comes from being able to take advantage of the space and moment of a public place. If local government or community rules prohibit a creative interaction, then valuable productions go elsewhere. If Portland is to facilitate growth in the film and video industry, it must, as a community, take steps to support the creative use of its public domain. The steps to be taken must meet the Citizens expectation of public safety, convenience, and repayment of cost born by the public. Once these standards are met, then steps should be taken which reduce the producers cost to do business locally, increase the efficiency of the governmental partnership, and increase the utilization of locally provided resources. These elements are found in the mission statement and industry growth strategy.

The growth of the film and video industry is unique with regards to its reliance upon and partnership in a variety of ways with the public sector. Government's unique role in this partnership takes on many of the following characteristics:

Bridging The Gap Between Public Sector And Private Sector - A significant amount of production activity occurs in the public domain (in the streets, etc.), near private property, and around private citizens not directly connected nor compensated for the intrusion of this particular business activity. Government plays a role in allowing the use of public assets with minimal impact on use by the general public and with minimal effort by the production company in attaining the right to utilize these public assets. The goal of government is to accommodate the production companies needs and attempt to do so without cost to the public.

This particular function of facilitation points out most clearly the differentiation in functional styles between film companies and government. Film companies are set up, often temporarily, to achieve their objectives through rapid-fire accomplishment of tasks. Their success or failure is based on their ability to achieve these objectives rapidly. This allows for completion of the tasks by the company without impeding on the creative elements that are necessarily a major part of production.

Government on the other hand, is primarily a maintenance organization, providing services to the public in a logical and efficient manner. Only in the case of major initiatives does government activity begin to approximate the rapid pace of film production in accomplishing tasks or altering tasks.

For government to play a productive role in relation to the film industry, it must bridge the gap between these unrelated styles and do so in a professional manner. That role requires specific skills and primarily involves coordination between the two entities.

Stewardship Of Public Assets - In order for the creative value of productions to be maximized, the producer must acquire the cooperation of the publicly and privately owned resources not directly under his control within the studio. This is accomplished through the permitting process and its the responsibility of local governments to facilitate. Permits becomes the evidence of allowable exceptions to public laws and are advanced only when the local government bureau charged with the responsibility of serving the public is convinced that the permitted action can be carried out without a compromise of public interests.

To adequately perform this role, government must on the one hand be interested in rapid permitting to allow for profit making, while on the other hand serve as an effective steward of the considerable number of public assets needed by the film company for production.

While the role demands primarily a coordinated approach to permitting, it may also include the recognition of opportunities to facilitate the use of industrial land for development of facilities for the film industry, recognition of opportunities to promote tourism based on the indirect promotion of a city that occurs through film, etc.

Respect The Role Of Public And Private Sector - The roles of a local government film office require a rather sophisticated understanding of the legitimate role of film companies in dealing with other segments of the private sector and an understanding of the lack of appropriate role for the public sector in these dealings.

It also recognizes the appropriate role of the public sector in jump-starting various elements of the private film industry and recognition of the need to utilize public resources appropriately to support initiatives that would primarily be identified with the private sector.

Because film companies often require contact with government for only short periods of time, the public role of a film office must allow for easy attachment and detachment to the objectives of private sector companies, and recognize inherently the need of these companies to utilize the public resources quickly to accomplish their film objectives.

Educational/Career Opportunities - Local government may play an important role in coordinating the growth in the industry with educational and other training institutions, with the goal of enhancing the local pool of talent of crews to meet anticipated demands. The development of career training is a necessary component of the development of future opportunities in the industry.

D. Response of Government to the Growing Industry

In order to respond to both the daily permitting demands associated with the film and video industry and to anticipate opportunities for growth in jobs, an effective government response must be occur at every level.

State Of Oregon - Though the State of Oregon has had an active film office in operation since 1969, Governor Goldschmidt authorized the creation of a State Film and Video Task Force in 1988 to review the status of the industry and develop a plan of attack to further promote economic development in this area. The 17 members of the Task Force included professional film makers and videographers, state and local elected officials, business professionals, and representatives of various public development agencies.

Some of the findings of the Task Force Report are listed in the following sections of this report.

Other Governments In The Portland Metro Region - Multnomah County currently provides the highest level of service in coordination of film industry permitting of any government in the Portland Metropolitan Region. This government has assigned a part-time staff member responsibility of coordinating permitting, intergovernmental relations dealing with film needs, and a minimal level of marketing. Multnomah County has not adopted formal policies related to promotion of the film industry. Also, the County has not taken on the task of defining the role of local government, as has been done in this report.

Tri-Met and the Port of Portland currently provide coordination for the specific needs of film permitting and use of publicly owned assets through the assignment of specific staff responsibility.

The governments of Washington County, Clackamas County and the Metropolitan Service District respond to the needs of the film production industry as they arise, but they have not designated an official contact person.

City Of Portland - The City of Portland has historically provided some level of service to film producers interested in utilizing public resources. The coordination of film permitting has consistently been centered in the office of either the Mayor or City Commissioners, with individual bureaus making specific permit decisions. Without clear and consistent policies for permitting, or without clear direction from Council as to the parameters for promotion of the industry, individual bureaus have independently developed policies, mostly informal, to meet the permit demands.

In December, 1988, Council unanimously passed a resolution recognizing the film and video industry as an important component of our city's economic future and creating a Portland Film and Video Task Force.

The Task Force was charged with the following:

- Coordinate development of consistent policies, fees and procedures to assist in supporting the film and video industry.
- Develop recommendations for staffing that maximize the City's ability to provide an effective level of service to the industry.
- Work with other agencies in the region to assist in the promotion and development of consistent policies that support and advance the State's action plan for film and video.

The City of Portland was clearly perceived as a cornerstone among the building blocks the State Task Force recommended for future development of the industry in the state. Portland has developed a thriving indigenous film and video industry. Many local productions have received international and national recognition, and local firms offer a wide array of production services. In addition, several feature films and television movies have been filmed here in 1988-89. Yet the local success of the industry to date has been achieved with only minimal support from local government.

The Portland Film and Video Task Force surveyed other cities around the country that compete with Portland for their share of the production market niche. In each case where successful development of the industry occurred locally, cities and counties had

established a film office or taken other initiatives to promote development of the industry. Results of this survey are included in this report.

The State Task Force believed that appropriate public involvement could make significant contributions to further development of the industry. The Portland Film and Video Task Force recommendations are consistent with that finding.

E. How Oregon and Portland Shape Up Competitively

The Oregon State Film and Video Task Force assessed the current situation of the film and video industry in the state and found the following:

Benefits - There are substantial benefits in developing the industry.

- The economic impact of the industry can grow rapidly.
- The industry can contribute significantly to favorable perceptions of the state.
- The industry has many other desirable characteristics (for example, it is environmentally sound).

Opportunities - Industry trends create certain opportunities:

- The industry is very large.
- The industry is changing rapidly.
- Demographics shifts mean changing consumption patterns.
 - Technological advances have caused industry restructuring.
 - Production costs have risen dramatically.
 - A high proportion of film production has moved out of Hollywood.

Constraints - However, the nature of the industry also imposes certain constraints. Financing remains difficult and the major studio's role remains significant.

Competition - The position of the competition (other states and localities) provides opportunities. Other states and localities provide success models. The industry has grown rapidly in several states and localities. Certain key film office activities appear to have contributed to particular states and localities success. Few states or localities, however, are offering significant financial incentives.

Oregon/Portland Competition

Oregon also faces certain disadvantages with respect to the competition.

Oregon currently lags behind many states. Our market share of production revenues is small and we currently spend less on promoting the industry than many other states.

Oregon Film and Video Division activities cannot reverse certain competitive advantages of other jurisdictions, including the misperception that production costs are

higher in Oregon. In addition, foreign exchange rates are creating opportunities for Canadian cities and Hollywood is taking action to recover the industry.

Portland Assets - Oregon has many valuable assets to foster film and video development.

- Oregon is close to Los Angeles.
- Oregon offers a rich diversity of locations.
- Oregon provides a favorable labor climate.
- An equipment and facilities base is available in the Portland area.
- Oregon has production costs advantages.
- Oregon offers a high quality of life.

Portland Liabilities - However, the state must overcome certain perceived liabilities:

- Transportation and support facilities for areas remote from Portland are limited.
- The equipment and facilities base is not complete.
- The labor pool is limited for multiple productions.
- Government has been perceived as a barrier.

F. VISION FOR FILM INDUSTRY DEVELOPMENT IN THE PORTLAND REGION

In order for the City of Portland to become an efficient and competitive public partner for further development of the film and video industry, the city, its citizens and employees must coordinate efforts and clearly define its vision.

In comparing the recent history of film productions in the region, and accounting for the current niche that is available due to market forces outside the City of Portland, the Portland Film and Video Task Force envisions a future that is much brighter than even the healthy industrial climate currently being experienced:

In the Portland area alone film will be a \$100 million or better industry that is the fastest growing industry in the region (compared to an estimated \$50 million industry statewide in 1988, and an estimated \$35 billion industry nationally).

The area will host a television series, and several television movies and feature films will be produced locally each year.

The region will be a net exporter of industrial and commercial productions as local capabilities are recognized nationally.

A large studio complex will be operating successfully and virtually all of the equipment and facilities needed to support the industry will be available locally.

There will be a special feeling, a mystique, about Portland as a center for film and video production; creative people and productions will be drawn here.

Education and training programs will be meeting the needs of continuing growth and technological change.

The partnership among producers, labor, education, and the public sector will be considered an international model that others will seek to emulate.

The City of Portland will be recognized as an efficient provider of services to the film industry. Characteristics of Portland's excellent national reputation in the industry will include the following: streamlined permit processing, an educated public, and a service-oriented public sector. All of these characteristics will make Portland more competitive in the market.

From a position of having no firm industry identity at all in the 1970's and 1980's, Portland will evolve an identity of having a relatively rich and very capable talent pool of industry professionals in the 1990's. Facilities will be scarce but adequate for all levels of production except the very large projects. Non-critical labor will be less expensive and better trained, especially in highly technical sound, camera, and lighting equipment. The industry will operate all over the State, but have an industrial focus in the northwest area of Portland, which is already an accepting home for most of the service support companies in the State.

Portland will continue to evolve and expand its indigenous industry with rich talent to serve local demand for television and feature film. The remarkable appearance of nationally recognized excellence in key areas of claymation, sound recording, and independent film production will continue to expand. Local industry growth will continue upon its own success. Levels of revenues and employment should increase from \$20 million and 300 people to over \$100 million annually and 600 people by the end of the decade. Factors fueling this growth do involve local government, except for minor issues of permit processing.

Portland will become the re-location destination of small, mature, successful companies now located in Hollywood. The type of company that is well situated in its production niche, that can no longer tolerate the LA environmental costs to do business, that has a deep following of production clients with little dependence upon a Los Angeles location, will be added to the production capability of the area in the 1990's.

Portland should not expect to receive substantial industry investment from the major studios for headquarter functions such as production development, distribution, finance, or training. It is possible that a major studio would become a contractor for production facilities located in Portland, but only if local costs were substantially competitive to other non-Los Angeles studios. (eg. Vancouver, B.C., Salt Lake City, and Las Vegas.)

Portland will experience extraordinary growth in becoming the preferred residence for top quality professional talent continuing to hold responsibilities with major Los Angeles based productions. These critical talents will travel to the production sites

anywhere in the world, and return to Portland due to the environmental advantages of living here. The growing resident population of high value professionals will increase the stream of location productions looking at the Portland area for major projects.

The increasing cost to do business in Los Angeles will result in Oregon being evaluated as a location site for more major feature film projects. The decision to shoot major projects in Oregon and Portland, will be directly related to the appearance of orderly arrangements to access needed production resources. The City Film Office will have a decisive impact on landing film projects in coming years, due to the need for the region to increase its inventory of large sound stage facilities and the need to train entry level labor.

Portland should expect to play the State's leading role in productions requiring urban-industrial settings. Additionally, it will be the provide the main logistical, business support services functions for out-of-town production companies. However, for non-industrial, non-urban projects, the region out to several hundred miles from Portland will benefit from increased location activity. These areas should not expect any major permanent investment in production facilities, except where a mature production company is recruited for permanent relocation out of California.

Beyond the employment, income, and tax revenues directly generated by the industry, there will be several other associated benefits:

- A "multiplier effect" of three times the direct spending will result from subsequent rounds of indirect spending.
- The wide range of jobs created will include entry level as well as skilled jobs, paying comparatively high wages.
- The industry is and will continue to be environmentally sound.
- The industry will spur regional tourism and give us a heightened identity increasing awareness of the region as a place to do and locate business.
- There will be new long-term industrial uses for vacant area property.

G. Key Elements for Success

The City of Portland Film and Video Task Force made contacts with other competitive jurisdictions to learn details of local film and video public policies and operations. Based on this research, there appear to be several key things local governments can do to successfully contribute to industry development:

- Develop regional government cooperation to support the industry.
- Develop a streamlined one-stop process for permitting.
- Clearly define reasonable cost-recovery permit fees and requirements. Establish operating policies and procedures, and a primary point of contact, for each relevant department and local government.
- Increase marketing and promotion of the region as a film location.

- Support private development of key production capabilities.
- Create a favorable public awareness, both locally and internationally, of the region as a center for the industry.
- Support development of industry specific training programs.

H. Components of Film Industrial Development Strategy

The overall strategy for development of the film and video industry in the region is consistent with the key success elements. The principal components of the strategy include:

- Establish a focal point for coordination of film and video activities within city agencies and among local governments in the region.
- Market publicly-owned resources reasonably accessible to film and video producers.
- Target particular industry segments for special marketing efforts, where the chances for success are reasonable and the potential benefits are high.
- Conduct special events to publicize the industry and foster further development.
- Financially support selected initiatives, on a seed-money or return on investment basis.
- Involve industry representatives, labor and educators along with public officials to plan and evaluate film and video development policies.
- Establish a public education program on industry operations.

I. The Choice for City Council

In this section of the report we have discussed the various elements of the film-related industry that could benefit from a partnership with local governmental.

Some elements of the industry will continue to experience a certain level of growth, regardless of the involvement of the City of Portland. These are the segments of the industry that do not require film permit assistance or which perform their activities on closed sets away from publicly-owned property. These would also include a variety of other support facilities that do not depend on film-specific projects for their income, such as sound, taping, and special lighting industries.

But other elements of the film-related industries are dependent on some level of government intervention in order to survive and grow. In the most extreme examples, these include film companies who depend on access to public facilities or assets in order to accomplish their film tasks and need efficient delivery of the right to utilize these assets in order for the venture to succeed economically. The indigenous industry-

related businesses also depend on loan assistance from government in order to expand their quality or quantity of services.

The City of Portland is at a crossroads with regards to its partnership with this unique and growing industry. The options in defining our role as partners with the private and public sector areas are clear:

Status Quo - Portland may choose to make no response to the growth of the industry. The result of taking no action will be a continued level of stress being placed on our system of permitting, as well as missed opportunities to become partners in building an industry and educational system to support that industry. As growth in the industry is partially dependent upon rapid access to city-owned resources, lack of Council action could potentially be reflected in loss of future production.

Management Of Current Demand - Portland may choose to work with other governmental entities to assist in the coordination of current service demands. This would dictate the allocation of minimal resources to partially pay for the hiring of one staff person, shared with other governments in the region, for permit coordination. This would allow for the stewardship of our resources utilized by the industry, but would not allow the city to become a full partner in the industry's growth.

Prepare For The Future - The City of Portland, alternately, could choose to become a full partner in a more dynamic effort to build a strong industrial base for film and video. This more aggressive approach would require the allocation of resources as identified in Option #1 or Option #2, as well as allocation of additional resources to perform second and third stage film office roles as identified in the next section of this report.

V. SURVEY OTHER MAJOR U.S. CITIES AND THE LOCAL INDUSTRY

National City Survey Background

Twenty-one cities and one county were surveyed to determine the procedures by which the jurisdictions support and interact with the film and video industry. Cities and counties with a high level of feature film and video activity were targeted for the survey. It is noted that more than 100 cities, counties, states, provinces, and countries have active film offices which regularly appear at exhibitions to market their location. A partial list of the active offices is found in Appendix D., Exhibiting Film Commissions.

The locations included in the Task Force survey were as follows:

- | | |
|-----------------------|-------------------------|
| - City of Los Angeles | - County of Los Angeles |
| - New York | - Toronto |
| - Vancouver, B.C. | - Chicago |
| - San Francisco | - Boston |
| - Dallas | - Seattle |
| - Phoenix | - Raleigh |
| - New Orleans | - Orlando |
| - Minneapolis | - Albuquerque |
| - Las Vegas | - Denver |
| - Tucson | - Salt Lake City |
| - Nashville | - Miami |

Findings

Establishment of a film office in the city/county level - Approximately half of the entities surveyed has established a formal film office with its own budget and full time employees. In general, the larger and more-active film cities had film offices while the smaller cities or those with a less-established film presence increase the job responsibilities of an existing city employee to include a liaison fiction with the film industry. A few cities near or serving as the State capitol relied upon the services of the State film office for coordinating and permitting.

Two notable exception exist to the aforementioned findings. The City of Orlando's interaction with the film and video community is coordinated by the Industrial Development Commission, a non-profit organization funded by city, corporate and individual contributions. The Industrial Development Commission acts as the City's liaison and serves as a one-stop permitting center for the industry. There is no permit charge.

The City of Minneapolis has hired an independent contractor on a renewable, one-year contract to serve as the liaison with the film and video industry. The contractor does not have permitting authority and is required to annually justify renewal of his contract by demonstrating the economic benefits of film and video production to the City.

Portland's nearest competitor, Seattle, doe not have a city film office. All liaison functions in Seattle are performed out of the City's Engineer's offices.

One-Stop Permitting - One-stop permitting is becoming increasingly prevalent and is currently offered by approximately one-half of the cities surveyed. Seattle does not offer one-stop permitting.

The City of Las Vegas Film Office hires an independent contractor to perform its one-stop permitting. If a production company requires a permit in less than the City's required three-day minimum, the production company may hire the independent contractor to expedite the permitting process or to perform other local services for the production company.

Permit Application Fee - Only six cities charge a permit application fee ranging from \$25/location/day in Chicago to a maximum of \$400/film in San Francisco. San Francisco has established the Film Production Special Fund into which 50% of the permit fee is deposited for the purpose of promoting San Francisco as a location for film.

Recovery of City-Employee Labor Expenses - The vast majority of cities surveyed have established a system by which the production company reimburses the City for any labor expenses incurred by the City on behalf of the production company. The most frequent charge is for City-employees to operate City owned equipment. It is common for cities to require an up-front deposit of refunds by the production company to cover expenses incurred by the City. A true-up of expenses is conducted at selected intervals or upon completion of production activities.

Use of City-Owned Equipment - Only two cities had a policy disallowing production company rental of city-owned equipment in general, although several cities would not allow rental of police equipment under any circumstances. The majority of cities had established rental fees for City-owned equipment with the notable exception of New York, Toronto, Chicago, and Tucson which require reimbursement only for labor-related expense incurred to operate City-owned equipment.

Police and Fire Officer Requirements - Police and fire officer requirements are met by almost all cities with off-duty personnel who are hired and paid directly by the production company usually for a minimum of hour hours at rate ranging from standard hourly rates to double time.

New York City has a special motion picture police unit dedicated solely to production activities that is provided gratis. The City of Orlando's off-duty police officers rate is segmented into one of two time blocks: between 7 A.M. and 7 P.M., officers charge their standard rate; between 7 P.M. and 7 A.M., officers charge an overtime rate equal to 1.5 times their standard rate. Neither the City of New York nor the City of Las Vegas allow their police and fire officers to work overtime for production activities.

Local Industry Survey Background

Forty-two businesses and independent professionals were surveyed to determine the most important needed service functions of local government, the positive and negative attributes affecting film and video production in Portland, and areas that the industry needed to grow or diversify in order to improve production capability.

Additionally, two large film production companies from Los Angeles were interviewed with regards to production in the City of Portland. Their comments, while

generally cordial, were useful in depicting the needs of an outside production company when coming into the City.

Ranking of Factors Affecting Local Production - Uniformly, local professionals feel the most important element determining the ability of Portland to be chosen as a production site is the match of the script with unique location characteristics of the City. The City's look and feel is what initially brings the producer to investigate the City as a production location.

Next most important factors included proximity to Los Angeles, easy air access, and availability of post-production facilities and services. Lesser importance was placed on quality and availability of local crew, and weather conditions. Lowest importance was placed on permit fee costs, income tax rates, and cost of local services.

Portland's Positive Aspects - Nearly all respondents identified Portland's diversity of locations as a positive attribute. Availability of production facilities and high quality crew was reported by most as a positive aspect. Locally, low costs of production was viewed as a positive aspect.

Portland's Negative Aspects - Nearly all respondents reported gaps in production facilities locally that are currently filled by Seattle or San Francisco providers. Film to tape transfer, large sound studios, film mixing, and post-production editing studios are inadequate for major production projects. Many respondents identified lack of crew depth and absence of a crew delivery system as a problem. Also reported was the absence of free-lance professional crew and the quality of directors, editors, and production services to reach the needs of high-end production. Some respondents identified weather, parking, down-town construction, and inadequate catering services as problems.

Needed Local Government Services - Most respondents identified the need for location scouting support, streamlined permitting, and Los Angeles marketing and recruiting support as areas where local government should increase its effectiveness. Several respondents reported that better access to buildings and public lands were needed. It was reported that the film permit system was uncoordinated in certain regards, that separate permit offices were needed when crossing jurisdictional lines or when asking to use facilities controlled by different bureaus of local government.

Visiting Production Company Requirements - Producers coming into the City require efficient access to permit authority to use publically controlled resources. While cost is of a concern, particularly parking, it is more critical that permits be obtained quickly and efficiently.

Basic services for communications, transportation, equipment night-time storage, and temporary services need to be organized and net-worked among knowledgeable companies and providers. Many local companies do not understand the mechanics and time-lines confronting a high-cost production schedule. A local film coordinator should have a list of pre-qualified providers ready to go.

Generally, the Portland area is very rich in its ability to duplicate the look of nearly any American city, at any point in the last 100 years. There is extraordinary diversity in terrain, building and bridge types, mountain and sea-shore vistas, and access to farm land -- all within an easy commute from a production base.

More production work will be accomplished locally when facilities can be rented or contracted that duplicate those available in Los Angeles. Portland does not now have the capability to support daily editing and film developing and transfer work needed for large productions. As local facilities come up to speed, then the amount of crew transported to Portland will be decreased. Eventually, only the director, producer, cameraman, key or critical lead crew people and star talent will be brought in -- the rest will be found locally, including the sound and video editing facilities.

VI. FILM OFFICE FUNCTIONS

A. Overall Process

During a series of discussions, the Task Force identified its own vision for local government in assisting the growth of the Film and Video Industry and made comparisons of that vision with the recommendations of the State Task Force Report. This information was compared to survey data from other competitive cities in the United States and Canada. From these discussions the Task Force defined clear local government roles and expectations.

The Task Force then discussed parameters for a City of Portland Film Office or film office roles.

From this emerged five basic assumptions that the Task Force utilized in analyzing the functions of a film office. These assumptions are defined later in this report.

The Task Force then prepared a discussion draft that detailed film office options. The draft included several options under each of the following categories:

- Film Office Roles
- Inter/Intra/Non-Governmental Models
- Permit Processing
- Philosophical Approach To Fee Structure
- Cash Flow Patterns

Discussion was then expanded of in each category, especially those of film office roles. Options were then narrowed in each category to a consensus of recommendations.

B. Basic Assumptions

In order to narrow the parameters for discussion of proposed film office functions, the following basic guidelines were identified:

Avoid Duplication: Duplication should be avoided as much as possible with other jurisdictions.

Prioritize Roles: Prioritization of a city film office's roles should be first in areas where it can uniquely provide assistance, followed by services that can piggyback those of other agencies.

Realistic Assessment: Roles should be adopted based on a realistic assessment of various jurisdiction's ability to support such services on an ongoing basis.

Perform Well: A film office should accept roles that it can perform well, and add responsibilities as it is capable of performing additional roles.

Use Existing Resources: Any film office functions should make best use of existing resources.

Accepting these basic assumptions, the Task Force then identified five broad areas of discussion for further development.

Film Office Roles: What roles should a film office play in local government?

Inter/Intra/Non-Governmental Roles: In what manner could the City of Portland carry out its responsibilities related to the film industry in coordination with other jurisdictions in the region.

Permit Processing: What is the most efficient manner in which to issue permits and meet the needs of both the film industry and the City Bureaus

Fee Structure: What philosophical approach to setting fees is most appropriate for local government in balancing its own revenue needs with the goal of expanding the filmindustry in the region.

Cash Flow Patterns: What method of processing revenues generated from fees best meet the needs of the City of Portland and its bureaus.

Each of these broad areas is further developed in the matrix found on the following page, titled Hierarchy of Film Office Roles.

**FILM AND VIDEO TASK FORCE
Hierarchy of Film Office Roles**

ROLE and SERVICES	Current Service Provider			Current Level of Service in City	Recommended Stage for Role Development
	In City	In Other Jurisdiction	Other Provider		
1. Basic Intake Information Insurance Verification Policy Dissemination Provision of Necessary Forms Acceptance of Script Copy	Film Liaison Bureaus	Multnomah County State of Oregon	Private Sector Film Personnel Chamber Rarely POVA Rarely	Adequate	First Stage
2. Permit Application Application for Permits Coordination of Pre-Production Meeting between Film Companies and Bureaus	Film Liaison Bureaus	Multnomah County State of Oregon		Inadequate	First Stage
3. Trouble Shooting A. Internal Governmental Roles Solving Problems Intergovernmental Assist Intergovernmental Assist Coordination of Permitting and Application Process Emergency Situation Enforcement and Compliance Creation of Satisfied Customers	A. Film Liaison Bureaus	A. Multnomah County State of Oregon		Inadequate	First Stage
B. External Assistance Location Assistance Referrals to Other Local Support Services Local Business Assistance Creation of Satisfied Customer	B. Film Liaison Bureaus	B. Multnomah County State of Oregon	Occasionally Private Organizations and Individuals	Inadequate	Second/Third Stage

ROLE and SERVICES	Current Service Provider			Current Level of Service in City	Recommended Stage for Role Development
	In City	In Other Jurisdiction	Other Provider		
4. Policy Development Dissemination Revision Interpretation Long-range planning Community Leadership Intergovernmental Policy Devel..	Film Liaison Council Staffs Council Bureaus Task Force	State of Oregon Multnomah County Tri-Met	Private Sector Film Personnel OMPA	Inadequate	First Stage
5. Liaison With Other Film Offices Work with Other Governmental Entities Information Exchange Coordination of Interjurisdictional Planning	Film Liaison	State Film Office		Inadequate	First Stage
6. Private Sector Development JobNet Industry Advisory Council Ambassadors Program Incentive Development to Expand Local Capacity Recruitment of Talent/Crews Plan for Long-term Needs Maintain/Expand Industry Base Job/Career Development	PDC	State Economic Development	All Private Sector	Inadequate	Second Stage

ROLE and SERVICES	Current Service Provider			Current Level of Service in City	Recommended Stage for Role Development
	In City	In Other Jurisdiction	Other Provider		
<p>7. Community Education</p> <p>Building Public Support for the Industry Public Relations Advisory Role to Educational Systems Premiers Media</p>	Film Liaison	State Film Office	Higher Education Private Sector NW Film Study Ctr. Community Colleges	Inadequate	Second Stage
<p>8. Marketing</p> <p>Goal Setting Deciding on the Products and Defining Parameters Photo File Collection Creation of Satisfied Customers Definition of Marketing Plan to the State Selling the Product</p>	PDC Film Liaison	State Film Office	Private Sector	Inadequate	<p>Second Stage</p> <p>The development of this role requires a clear definition from the State as to parameters of its marketing plan.</p> <p>The City should use this information to develop its local marketing plan that is complimentary.</p>

D. Inter/Intra/Non-Governmental Models

Question: In what manner could the City of Portland carry out its responsibilities related to the film industry in coordination with other jurisdictions in the region?

During Task Force discussions over several months, and through assessment of other film offices around the country, we identified several governmental, intergovernmental, and non-governmental models:

- No formal film office. Film companies deal directly with needs in each bureau.
- No formal film office, but City (governmental) appointed liaison for film who refers to bureaus, etc, acts as a central information point.
- No formal film office, but City Hall employee appointed to refer to bureaus, serve as a central point of contact, etc.
- No formal film office, but City Hall employee appointed to coordinate film requests, serve as a central point of contact, verify insurance, etc.
- Formal City film office. City/County shared film office Regional shared film office. State office located in Portland, with the City serving as a liaison role to bureaus.
- Private contractor, coordinating permitting through the governmental bureaus.
- Industrial Development Commission.

E. Permit Processing

Question: What is the most efficient manner in which to issue permits and meet the needs of both the film industry and the city bureaus?

The Task Force considered three major options for permit processing, as follows:

A. Centralized Process

INITIAL INTAKE

Central Location

Initial intake would occur in a central location.

**INSURANCE
VERIFICATION**

Central Location

Insurance verification would occur in a central location. This would include review by the City Attorney's Office and in some cases, the Bureau of Risk Management.

**PREPRODUCTION
MEETING**

Central Location

A preproduction meeting would be held to coordinate bureau permit decisions in larger productions. This could take the form of regular meetings of a formally established film committee made up of bureau representatives.

**ONE STOP
PERMITAPPLICATIONS**

Central Location

One application for all permits would be made in a central location, with staff facilitating all permit approval according to application requests.

DECISION-MAKING

Bureaus Make Final Decisions

Bureaus would make final decisions about permit approval and permit parameters. Additional discussions between bureau representatives and film company representatives would be held as needed.

PERMIT PROCESSING

Centralized Coordination

A trouble-shooter would coordinate not only the application process but the coordination between bureaus.

B. Modified Centralized Process

INITIAL INTAKE

Central Location
Initial intake would occur in a central location.

**INSURANCE
VERIFICATION**

Central Location
Insurance verification would occur in a central location. This would include review by the City Attorney's Office and in some cases, the Bureau of Risk Management.

**PREPRODUCTION
MEETING**

Central Location
A preproduction meeting would be held to coordinate bureau permit decisions in larger productions. This could take the form of regular meetings of a formally established film committee made up of bureau representatives.

**MULTIPLE STOP PERMIT
APPLICATIONS**

Referrals to Bureaus
Referrals would be made to each bureau for specific permit applications.

DECISION-MAKING

Bureaus Make Final Decisions
Bureaus would make final decisions about permit approval and permit parameters. Additional discussions between bureau representatives and film company representatives would be held as needed.

PERMIT PROCESSING

Referrals to Bureaus
Bureaus and film company representatives would be responsible for coordinating inter-bureau permit processing.

C. Decentralized Process

MULTIPLE STOP PERMIT APPLICATIONS

Referrals to Bureaus
Referrals would be made to each bureau for specific permit applications.

INITIAL INTAKE

In Each Bureau
Initial intake would occur in each bureau.

INSURANCE VERIFICATION

In Each Bureau
Insurance verification would occur in each bureau. This would include review by the City Attorney's Office and in some cases, the Bureau of Risk Management.

MULTIPLE STOP PERMIT APPLICATIONS

Application in each Bureaus
Application for each permit would be made in each bureau, with an assigned staff person in each bureau handling requests.

DECISION-MAKING

Bureaus Make Final Decisions
Bureaus would make final decisions about permit approval and permit parameters. Additional discussions between bureau representatives and film company representatives would be held as needed.

PERMIT PROCESSING

Referrals to Bureaus
Bureaus and film company representatives would be responsible for coordinating inter-bureau permit processing.

F. Philosophical Approach to Fee Structure

Question: What philosophical approach to setting fees is most appropriate for local government in balancing its own revenue needs with the goal of expanding the film industry in the region?

Background

In the Mayor-Commissioner form of government such as in Portland, city bureaus have operated rather independently in the establishment of fees, resulting in a wide variety of charges for services.

These various charges have been developed in an effort to reimburse the City for the cost of provision of the services.

Other services have been historically provided by the City without direct charges attached, and are supported indirectly through general city revenue collections.

Philosophical Models For Fee Structure

The Task Force identified some of the types of charges currently made by city bureaus, and identified types of charges in other cities for film production.

From this information, the Task Force distilled the various forms of charging into four distinct philosophical models.

Revenue Generation From The Producer - In this case, the city would establish fees in a way such as to enhance general fund. The specific characteristics of charges under this revenue generation model would be:

- Cost Recovery Plus, including collection of:
- Administrative Charges
- Daily Film Charge
- Overall Permit Charge
- Specific Charges For Various Items (street closures, property use, equipment rental)
- Staff Time Charges
- Deposits/Bonds

Cost Recovery - In this case, this city would establish fees designed to recover expenses. Specific characteristics of charges under this philosophy are:

- Fee Structure based upon Administrative Charges
- Optional Specific Charges Of Various Items (street closures, property use, equipment rental)
- Staff Time - Optional
- Deposits/Bonds - Optional

No Cost - No specific permit charges, with deposits and bonds optional.

Incentives - Under this system, the city would subsidize the cost to bureaus for lost revenues due to lack of recovery of costs. This subsidy could come from the General Fund, state assistance, private sources, or a trust fund account to which specific charges are assessed. It could involve criteria for incentive application, such as certain percentage of film being shot in Portland.

G. Cash Flow Patterns

Question: What method of processing revenues generated from fees best meets the needs of the City of Portland and its bureaus?

The Task Force explored three identifiable cash flow options for consideration:

Entrepreneurial Approach - No Direct Charges Made of the Film Producer at the time of production. Rather, public cost reimbursed with State revenue sharing.

In this approach, the City of Portland would not directly or immediately take compensation for use of its public resources and facilities. Rather it would work out an agreement with the Oregon Department of Revenue for sharing the income tax revenue stream created from film production profits. Film producers will eventually pay a state income tax. Under this scenario, the tax would be returned to the level of government where the costs were incurred by the tax paying producer and its employees.

- **Advantages** - The advantages of this approach are found in market perception: it would appear that the City has no permit fees in the traditional sense. Portland would develop a market-niche as a low-cost city in which to produce. In reality, producers will give back to government revenue based upon the profitability of their projects and based upon the reported income of the employees.
- **Disadvantages** - Disadvantages exist to the extent that government revenues can escape for failure to file a tax return by foreign companies. Large personal incomes of stars are not tracked under current guidelines of the Oregon Department of Revenue, meaning new methods would need to be developed to account for the share of locally earned income of these stars.

Another disadvantage may be the relative difficulty in initiating state revenue sharing back to local governments.

Further, so long as the tax paid is related to profits, the amount of taxes paid by a given picture will have little correlation to the actual cost

Cash Flow incurred by local government to provide services as to a specific film producer. A partial cure to the defect is to move toward a value-added tax approach.

If the City of Portland chose to be especially bold, fostering a climate for industrial growth and seeking to make itself distinct and unique from other cities, the entrepreneurial approach is most appropriate.

General Fund - Under this approach, permit fees and other direct charges would be sent directly into the General Fund. Bureau costs to serve the needs of film/video producers would be budgeted and allocated in the same budget cycle as all other costs.

- Advantages - This approach has the advantage of not having to create any new management system from that which now exist in the City's fiscal accounting system.
- Disadvantages - However, it is least flexible and adaptable to the increasing costs associated with the growth of the industry.

Bureau Cost Recovery Approach Using Permit Fees - Under this option, a City fund would be set up to specifically receive all revenues from permits, charges, and fees of the producers. The fund would be used to reimburse specific bureau costs incurred for production support activities.

- Advantages - The advantage of having a direct cost reimbursement program comes in efficiency and flexibility provided to the bureau managers. They can be more confident that their costs will be recovered when they support a specific activity.
- Disadvantages - Disadvantages come from the amount of time and investment required to operate a new fiscal system.

Invoicing - The Accounts Receivable section sends out invoices for a variety of types of City services:

The established procedure is as follows:

- Accounts Receivable Transmittal - Bureaus are required by City Code to submit their lists of charges to be billed by the Accounts Receivable section. This is accomplished by filling out an Accounts Receivable Transmittal form.
- Invoice Preparation - The Accounts Receivable section then prepares an invoice that represents the charges documented in the Accounts Receivable Transmittal

Accounts Receivable can create special accounts to track cumulative charges made on specific projects or broad project categories such as film and video.

VII. FILM AND VIDEO TASK FORCE FINDINGS

Overall Findings Are As Follows:

1. The film and video industry, with its direct and indirect effect on the economy, is a growing industry both locally and nationally. The City of Portland and the State of Oregon are in a competitive position to benefit from this growth and capture a share of this expanding market.
2. The State of Oregon, and the Portland metropolitan region, are experiencing a period of rapid growth as a location for film production originating in other film centers. In addition, an expanding indigenous industry has created a national reputation for Portland, fueling a rapid increase in job creation and a more qualified local labor pool.
3. Local governments around the country have responded in a variety of structural ways to meet the challenges associated with this growing industry. In all cases in which the industry has experienced rapid growth, government has played a vital role as an efficient provider through permitting, access to facilities, loan assistance, and other forms of public partnership in job creation.
4. The 1988 State Task Force Report to Governor Goldschmidt, titled Action Oregon, challenged local governments to take advantage of the expanding job opportunities available through growth in the film and video industry. The report recognized the unique partnership that must exist between the public and private sectors at every level to create a climate conducive for growth.
5. The lack of centralization in the commission form of government provides an unique challenge in government's coordination of service delivery related to the film industry. There is currently minimal authority in the City of Portland to provide these services, and clear bureau policies as well as clear directives are needed in order to address the industry perception that government permitting is a barrier.
6. As the needs of the film and video industry often cross jurisdictional boundaries, and as these boundaries further the perception that permitting is a barrier to growth, the Task Force recognizes that many of the functional needs of the industry would best be delivered regionally.
7. In addition, to the higher end wages often offered in segments of the industry, the growth in the film and video industry uniquely creates opportunities for work for low and moderate income individuals in casual employment, which in many cases leads to future full-time employment. The development of these job opportunities creates a demand for training programs at all levels of our educational institutions.
8. The citizens of Portland appear to be poised to welcome growth in the industry, in spite of a comprehensive governmental or private sector strategic approach. This was most clearly evidenced by the willingness of North Portland residents to invest neighborhood dollars into infrastructural improvements that would enhance the proposed St. John's Film Studio

Project. Few complaints have been logged that were associated with the public inconvenience associated with filming to date in Portland.

9. The City of Portland has historically responded to the challenges associated with growth in a manner that not only promoted responsible policy approaches but also assisted the private sector with its permitting needs.

Examples would include the Building Permit Center, the Parks Permit Center, and the Development Liaison position to assist private business in the permitting process.

10. Adoption of the recommendations of the City of Portland Film and Video Task Force would place Portland in a more competitive position to make more effective use of our inherent strengths as a film location site and support further development of our indigenous industry.

VII. FILM OFFICE RECOMMENDATIONS

A. City of Portland Film and Video Mission Statement

The mission statement provides general direction to the City and community, and provides a statement of intentions with regards to its involvement with the film and video industry.

City of Portland

Wherein the City intends to benefit from the growth of the film industry and it recognizes that success is dependent upon the harmony of the relationship between City government, other local jurisdictions, and the film production community -- the City of Portland, its citizens and its employees, shall organize and operate its resources to become an efficient and competitive public partner to industry operatives. The City shall seek to become a favored production location which provides high quality labor resources, an effective industry support infrastructure, and the best possible climate of government cooperation.

B. City of Portland Film Office Mission Statement

The Film Office mission statement provides a context within which to develop policy, limit scope of activities and programs, and provides the basis upon which to form inter- and intra-governmental agreements.

Film Office Function

The Film Office serves as a public sector partner in promoting the development of the community interests related to the film industry. The Film Office has the mission to protect public property, insure public convenience, monitor public safety, and facilitate access to locations, infrastructure, and labor in the Portland area, as related to film and video industry. The Film Office has the responsibility to implement code and public policy and to represent the interests of all sponsoring governments and agencies.

C. City of Portland Film Industrial Development Policies

The following policies are recognized as being applicable to the operations of City government:

1. Publically owned and managed resources shall be available to producers of film and video projects.
2. Permitting shall be coordinated through a central office, called a Film Office, which acts on behalf of all City officials and acts with the purpose of providing efficient and timely coordination of both the City bureau and the permit applicant.
3. The costs to the City of supporting specific projects shall be recovered as a direct user fee, based on the cost of providing the service. The receipts are to be returned to the City Bureau which incurred the costs.
4. The City of Portland will work as a partner with other entities to encourage further development of the film industry. These entities include partnerships with other jurisdictions, educational institutions, private business, individuals who work in industry, and representative organizations.

D. Film Office Role Development

1. A Film Office - A Collection Of Roles:

The needs of the industry are served from many offices and persons within City government, depending upon specific situations arising from the producer. As these services became routine within bureaus, an informal way of supporting the industry has evolved. However, in recent years, the cost to carry out the roles has grown to be as significant as services requiring separately budgeted and manned activities.

The City of Portland should formally develop film office roles in order to adequately respond to the service demands of the City as well as assist in the development of the indigenous film and video industry.

The Task Force recommends that Council review the establishment of a "Film Office" as in reality a collection of roles, some requiring staffing additions and others that are accomplished by current staff. In reality, the "Film Office" should be seen as a collection of functions necessary to promote the development of the film and video industry locally and meet the current service demands.

These roles are clearly derived from the traditional duties of municipal government as they directly relate to interactions with a local industry which has an intrinsic need to operate in and through the public domain. Initially, the roles are managed in a decentralized fashion using existing officers of government. As support activities become more intensive, a need exists to centralize coordination of government functions, both within and between local governments.

2. Three Stages Of Development:

The City should prioritize the assignment of roles to staff (or the hiring of additional staff) based on the recommended stages of film office role

development that was identified by the Task Force. (See Hierarchy Of Film Office Roles, pp.)

- Each of three stage would incorporate increasing public sector responsibilities and services in response to clear successes and a supportable track-record of local industry activity.
- The responsibilities would be limited to those which are necessary and appropriate for government supporting the growth of local motion picture production activities.
- The appearance of a formal film office should await Second Stage developments, specifically when funding sources have been confirmed.

3. Policy Roles:

As in all city matters, the policy role should remain in the office of the Commissioner or Mayor, but it is not necessary that other identified roles be housed in the office of these elected officials in order to effectively be performed.

4. First Stage Roles:

The roles identified for first stage development could be handled by the hiring or assignment of one FTE or equivalent, and this FTE position could serve these functions for the City of Portland and Multnomah County, and eventually all regional governments. The Task Force recommends that one FTE position be filled in order to carry out these first stage roles. The Task Force recommends that this FTE be a shared position between the City of Portland and Multnomah County, and eventually all jurisdictions in the tri-county region. The premium skills needed for this stage are abilities to work within the bureaus and between local governments. First stage role functions are listed in greater detail in the next section Staffing Options, on the following pages.

Fully organize all existing public sector support functions within City government into a cohesive, consistent set of policies and procedures. Publish these procedures widely in order to provide the local industry the benefit of efficient public sector operations. Use these policies and procedures to create a one-stop permitting process for the City of Portland.

5. Second Stage Roles:

In the next stage, the Task Force recommends the assignment of an additional half-FTE to extend the functions of the Film Office into the private sector. The expansion of functions will occur in the marketing function, both at the local indigenous industry level and at the State level. The skills and resources needed to coordinate a fast moving permit center and inter-governmental marketing effort would be more than the Stage One coordinator could handle. Hence, a second person should be considered as needed to meet the job description and function. The roles are included in the following matrix titled, Second Stage, Film Office Roles. This position would be supported by a proposed "Operating Fund" from public and private resources.

6. Full Complement Of Services in the Third Stage

The creation of two full-time positions to serve the metropolitan region, along with the continued policy functions in the office of a Council member, should provide the complement services necessary to promote development of the industry for the first five years. An expected concentration of expertise from these two would be inter-government liaison on one hand and strong marketing and promotion on the other.

In this stage, the Film Office should be prepared to facilitate the development and operation of missing privately owned production facilities necessary for optimum, long-term local production activity. Industry development has

lagged in recent years because of the absence of investment capital for expensive equipment or infrastructure. The decision to invest has failed to occur, in these instances, because no single company has the mission of establishing infrastructure desirable and necessary for the growth of all others.

Extend the Film Office marketing functions to levels now provided to indigenous Oregon industries including: promotion of local talent to national and international producers and studios in locally sponsored events, creation of an active presence in the film/video production centers of Los Angeles and New York where local production resources are showcased, and operation of an industry Ambassador program for visitors to the region.

E. Intergovernmental Relationships

1. First Stage Roles

Though the City of Portland should fill one FTE position to carry out first stage film office roles, the non-policy roles identified in this stage could be played by a person who serves in these roles for both the City of Portland and Multnomah County.

This would serve the purposes of both avoiding needless duplication as well as assist in coordination of intra-jurisdictional permitting.

The Task Force recommends that the City Council authorize the Commissioner-in-charge of the film office to initiate discussions with Multnomah County with the goal of joining with Multnomah County in hiring this one FTE position for the first stage film roles.

2. Second Stage Roles:

The Task Force recommends that the Council authorize the Commissioner in-charge of the film office to initiate discussions with other jurisdictions in the region with the goal of establishing regional funding for this one FTE position that is envisioned to be shared initially by the City of Portland and Multnomah County.

The Task Force recommends that the Council authorize the Commissioner in-charge of the film office to initiate discussions with other jurisdictions in the region with the goal of establishment of consistent policies, fees, and procedures in each of these jurisdictions, in order to more effectively respond to the need for inter-jurisdictional cooperation in film permitting.

Though the Metropolitan Service District does not currently handle film permitting, the unique needs of film production meet the test for appropriateness for regional coordination of service delivery.

A sample agreement that could serve as a basis for negotiations toward meeting these goals has been prepared by the City Attorney and is included in the appendix of this report.

F. Staffing Options

First Stage Film Office Roles

Roles	Services
Basic Intake	Information Insurance verification Policy dissemination Provision of necessary forms Acceptance of script copy
Permit Application/Referral	One-stop application for permits Coordination of pre-production meetings between film companies and bureaus.
Trouble Shooting/Internal Governmental Assistance	Solving Problems Intergovernmental assistance Intragovernmental assistance Coordination of permitting and application process. Emergency situations Enforcement and compliance monitoring Creating satisfied customers
Liaison With Other Film Offices	Work with other government entities Information exchange Coordination of interjurisdictional planning

The development of these roles are critical for pulling together the variety of functions that must be coordinated if the City of Portland is committed to becoming a partner in the growth of the industry.

First Stage Role Options

Option	Roles	Funding	Location Options	Advantages	Disadvantages
1	Hire one FTE Provide desk, telephone, Metropolitan Arts minimal office, supplies, minimal travel, minimal external materials and promotion services	\$60,000	Cable Office, PDC, Commission Proposed Office of Civic Events	Provides a basic level of service to relieve stress on the system. Recognizes the city's role in coordinating intergovernmental services. Highest level of independence, decision making and supervision.	Highest Cost Fails to recognize the importance of the interjurisdictional service need of the industry and unnecessarily creates jurisdictional duplication
2	Share one FTE between the City and Multnomah County Provide desk, telephone, minimal office equipment and supplies, travel, and minimal external materials and services Bring marketable guide to film in Portland and Multnomah County	\$30,000 (City) \$30,000 (County)	Cable Office, PDC, Metropolitan Arts Commission, Proposed Office of Civic Events, MSD	Provides a basic level of service to relieve stress on the system Recognizes the City and County's role in coordinating intergovernmental and intragovernmental services Avoid jurisdictional duplication of services, saving tax dollars Policy roles in each government would remain in the offices of the elected officials	Requires agreement by Multnomah County to share costs, a decision that may not be made as policy by the date of Council consideration of this document Annual budgeting for office functions slightly more complex, requiring two governments to make alterations rather than one Less independence in decision making and supervision
3	Private Contract for services rendered only during peak periods Purchase only the time of the individual services Contracted individual or company would provide office, telephone, etc.	\$20,000 (City initially)	POVA, Chamber, APP, Private contractor	Provides a basic level of service that partially relieves the stress on the system Recognizes the role of the City in contracting for the coordination of intergovernmental assistance Lower cost	Requires agreement by another individual or agency to accept the budget restraints Loss of independence in coordination between policy, service provision, and potential second stage roles. Located most likely out of the central functioning environment of government.

Option	Roles	Funding	Location Options	Advantages	Disadvantages
4	Private Contract jointly with Multnomah County for services rendered during peak periods	\$10,000	POVA, Chamber, APP, Private Contractor	<p>Provides a basic level of services that partially relieves the stress on the system</p> <p>Recognizes a role of the City and County in contracting for the coordination of intergovernmental assistance</p> <p>Lower Cost</p> <p>Avoids jurisdictional duplication of services, saving tax dollars</p>	<p>Requires agreement by another agency to accept the budget restraints</p> <p>Loss of independence in coordination between policy, service provision and potential second stage roles</p> <p>Located most likely out of the central functioning environment of government</p> <p>Requires agreement by County to share costs, a decision that may not be made as policy by the date of Council consideration of this document</p> <p>Annual budgeting for office functions slightly more complex, requiring two governments to make alterations rather than one</p> <p>Less direct involvement by government in coordination of permits, and smaller number of identified first stage roles that could be developed</p>
5	Private contract, paid jointly by any combination from several sources	<p>\$20,000 to \$60,000</p> <p>City pays share</p> <p>County State Private Industry</p>	<p>Cable Office, PDC, Metropolitan Arts Commission, Proposed Office of Civic Events, MSD</p> <p>County offices POVA, Chamber APP</p>	<p>Lower costs for each sharing responsibility</p> <p>Recognizes the role of government at all levels and private sector to jointly provide this additional level of service</p>	<p>Requires complex set of agreements between governments and private sector, with only minimal knowledge of willingness of each to assume this responsibility</p> <p>Location could be out of the central functioning environment of government</p> <p>Annual budgeting for office functions more complex</p> <p>Less direct involvement by government in coordination of permits, with potential for smaller number of identified first stage roles that could be developed</p>

G. Goal Recommendations for Second and Third Stages of Film Office Development

In addition to the recommendations listed previously, the Task Force recommends the following goals or outcomes be adopted by Council for the development of the roles and specific functions for a City of Portland Film Office. The Task Force recognizes that the accomplishment of the goals may require additional public resources from a variety of sources at a later date. The accomplishment of these goals would be the responsibility of the expanded role identified for the Portland Development Commission, in conjunction with other identified group roles.

1. Establishment Of A Film and Video Industry Advisory Council (Second Stage)

This group would be formed by representatives of local producers, labor, and educators, with the intent of creating a community consensus around necessary steps for the local government and other agencies to further develop the industry.

The group would recommend strategy and timing for public agencies, provide advice on economic planning measures dealing with labor force training and recruitment, etc. The Council would present an agenda for other private individuals, agencies, businesses, and institutions to follow voluntarily in order to coordinate the direction of all concerned members of the community.

2. Recruitment Of Television Series Productions (Second and Third Stage)

The special advantages of this market segment include:

- Provision of employment for sustained periods, which not only boosts incomes but creates an environment conducive to training and development of less experienced personnel.
- Promotion of the public image of the region among a wide audience, which in turn fosters tourism and other economic development.

3. Support Development Of A World-Class Seminar/Festival Center

The objectives of this event would include:

- Giving Portland an image with the national film community as a center of interest that is focused, innovative, and "open for business."
- Attracting key industry professionals to Portland so that they can see first-hand what the city has to offer in terms of location, work environment, industry infrastructure and talent pool. In this sense this event would be a business recruitment tool.
- Developing a first-class educational event that will stimulate the local industry, and raise the level of professionalism and inspiration within the commercial, artistic, and student media arts communities.

- Serving as a focal point for cooperative planning, dialogue, and resource utilization between the various public and private institutions and programs working to facilitate long-term growth of this industry in a way that enhances the city.
- In the long-term, this event should be self-sustaining, but in the short-term the city should consider providing grants or loans to help get it started.

4. Support Development Of Needed Facilities And Equipment

Existing development loan programs should be used to support construction or acquisition of the following, where private applicants present appropriate justification. Potential projects include:

- A large sound stage studio
- A film to video transfer system
- 35 millimeter cameras available for rent

5. Employment And Training

Develop a coordinated curriculum to meet the needs of the industry. Various institutions in the region provide at least some film and video education and training. These include not only colleges and junior colleges, but also organizations such as the Northwest Film and Video Center and cable public access corporations. The City can take the lead to help assure that these programs are coordinated and complementary and meet the needs of the industry.

In addition, the City of Portland should take a role in the recruitment of additional specialized private training institutions in order to create a full complement of training for emerging career opportunities.

H. Permit Processing

The Task Force recommends that Council establish a centralized permit processing system (First Stage). The option of for processing is defined earlier under "3. Permit Processing", p. 44 of this report.

The Task Force recommends that Council authorize the Commissioner-in-charge of the film office to initiate discussions with Multnomah County with the goal of establishing a centralized permit processing model for both the City of Portland and Multnomah County, the role of permit coordination being performed by the previously described joint FTE position created and paid for by the City of Portland and Multnomah County.

The Task Force recommends that the Council authorize the Commissioner-in-charge of the film office to initiate discussions with other jurisdictions in the metropolitan region with the goal of establishing a centralized permit processing model for all governments of the region (Second Stage).

I. Philosophical Approach To Fee Structure

The Task Force recommends that the City adopt a cost recovery model in the establishment of charges for film permitting.

The Task Force Report identified a wide variety of models for fee collection by the City of Portland, and recommends that Council establish some authority for review of these various models with the following goals.

1. Standardization of charging methodology (i.e., all administrative charges or all separate charges for specific services).
2. Consistency with charging methodology in Multnomah County.
3. Recommendations for temporary incentives for select industries such as film, where trial periods of no-cost permitting could be evaluated.
4. Any action with other jurisdictions in the metropolitan region that would establish more consistency in fee collection methodology, relating to film.

The Task Force recommends that Council authorize the Commissioner-in-charge of the film office to initiate discussions with the Oregon Department of Revenue and other state government entities with the goal of establishing a self-replenishing fund as described on page 50 of this report, in a five-year pilot program.

Such a fund would be dedicated for subsidization of bureau permit charges in the following manner:

1. Fund would be replenished with state revenue sharing dollars.
2. The State Of Oregon would market itself as a no-cost permitting state and for all practical purposes to a film producer permits would be at no cost.
3. The bureau of each jurisdiction would charge permit fees to the fund, rather than to the company. This would allow for recap of the lost revenue that would otherwise be the responsibility of the film producer.
4. Safeguards would be developed to insure that the use of a self-replenishing fund would occur within established parameters.

The use of this fund in this manner would be re-evaluated in five years to determine its impact on promotion of the indigenous industry as well as recruitment of industry segments from other film center.

J. Cash Flow Patterns

The Task Force recommends that Council establish a policy that allows for Bureau reimbursement for all charges made by that particular bureau on individual film and video projects.

This most closely reflects the desire to assure cost recovery for bureaus in providing services to the film industry.

The Task Force recommends that a system be established in the Accounts Receivable section that allows for the tracking of revenue based on film production generally as a category, as well as based on particular film and video projects.

K. Budgetary Implications

The Task Force, in recommending a joint shared office between Multnomah County and Portland, and eventually the region, recognizes that a period of time will be required to implement this shared agreement (First Stage).

Regardless of the outcome of negotiations toward this goal, the City of Portland should move forward with the establishment of its own film office roles in order to adequately address the industry-related service demands.

The Task Force recommends that a budget allocation be made for 1990-91 budget year, to allow for the start up costs associated with developing the first stage of film office development.

The actual General Fund budgeted amount will depend on the type of arrangement envisioned by Council for performance of these roles, with estimates varying from a low of \$10,000 to a high of \$60,000. These costs, and a description of the services provided under each, are included in the matrix on the previous pages titled, Staffing Options, First Stage Film Office Roles.

The highest funding level would pay for basic personal services, materials and services, external materials and services, capital, and the production of a marketable guide to filming in the Portland metropolitan region. The lowest funding level would provide for only the most basic personal services.

The "Film Office," or the location of the housing of the one staff person, would be in a politically neutral location that would provide ready access to the central government functions of both the City of Portland and Multnomah County.

The Task Force recommends that the payment for the development of these first stage roles in the first year be made with utilization of General Fund dollars.

The Task Force recommends that a regional funding mechanism be established by the third year, assuming first stage film office roles (Second Stage).

Establish a Film Office operating fund from public and private sources. Public funds would be derived from State and local governments which perceive benefit

from motion picture activities within their jurisdiction. Private funds would be solicited from organizations directly supporting this industry and from tourist industry associations which provide transient and visitor housing, food, and entertainment to the motion picture crews. Within the parameters of this funding pool, move into Stage Two Development.

The Task Force identified no specific source of funding for the Portland Development Commission position described earlier under "Second Stage Film Office Roles."

The Task Force recognizes that the City Council has engaged in discussions about the establishment of an office that would coordinate civic promotion, and recognizes that many of the functions associated with film permit processing are similar to those of civic events processing. If there are future discussions of the establishment of a civic promotion office, the Task Force recommends that consideration be given to these similarities. The Task Force further recommends that Council consider the similarities in personnel needs for an Office Of Civic Promotion and the Film Office roles. It is the intent of the Task Force to avoid duplication, while at the same time enhance the ability of the City in the first stage to more rapidly process permits. Beyond the Film Office roles identified for first stage development, the Task Force recognizes that there are few similarities with roles in a proposed Office Of Civic Promotion.

The Task Force recommends that the Office Of Fiscal Administration, the State Economic Development Department and the Department of Revenue jointly engage in a project that would lead to the following outcomes:

1. Demonstration of flow of direct tax dollars to state and local governments resulting from the indigenous industry and that recruited from other film centers.
2. Demonstration of the flow of indirect tax dollars to state and local government resulting from the same.
3. Demonstration of the "multiplier effect" on creation of additional jobs and income for local businesses and citizens.

IX. BUREAU POLICY RECOMMENDATIONS SECTION

In the following sections, separate City bureaus present existing policy areas, philosophical views on bureau support concept, fee structure if utilized, and any recommended modifications that should be considered by City Council.

These procedures have been developed within each bureau out of experience and lessons learned. The plans used to date have generally been satisfactory to indigenous companies within the City of Portland.

It is generally felt by the Task Force that stream-lining is needed if greater film activity comes into the City. There is considerable extra, non-budgeted time and effort required to support a major film project in the City. So far, bureaus have accomplished this work through internal reallocation of resources or assigning extra duties to employees.

OFFICE OF THE CITY ATTORNEY

ISSUE: Review And Approval Of Insurance Coverage

1. Existing Procedure

The City Attorney's Office reviews insurance coverage, and approves as to form, those satisfactory certificates that are required by the provisions of permits or location agreements authorizing activity by film companies.

2. Philosophical Approach

Approval as to form consists of a review of insurance coverage to determine if the coverage provided adequately protects the city's interest.

3. Fee Structure

There is no charge for the review of insurance documents.

4. Turnaround Time Requirements

Usually one or two days, but possibly can be longer depending on workload.

5. Parameters Of Insurance Requirements

Production company shall maintain public liability and property damage insurance that protects production company, its subcontractors, and the City and its officers, agents, and employees from any and all claims, demands, actions, and suits for damage to property or personal injury, including death, arising from the production company's activities under this location agreement. The insurance shall provide coverage for not less than \$200,000 for personal injury to each person, \$500,000 for each occurrence, and \$500,000 for each occurrence involving property damages; or a single limit policy of not less than \$500,000 covering all claims per occurrence. The limits of the insurance shall be subject to statutory changes as to maximum limits of liability imposed on municipalities of the State of Oregon during the term of the agreement. The insurance shall be without prejudice to coverage otherwise existing and shall name as additional insured the City and its officers, agents, and employees. Notwithstanding the naming of additional insured, the insurance shall protect each insured in the same manner as though a separate policy had been issued to each, but nothing herein shall operate to increase the insurer's liability as set forth elsewhere in the policy beyond the amount or amounts for which the insurer would have been liable if only one person or interest had been named as insured. The coverage must apply as to claims between insured on the policy. The insurance shall provide that the insurance shall not terminate or be cancelled without thirty (30) days written notice first being given to the City Auditor. If the insurance is cancelled or terminated prior to completion of the location agreement, production company shall provide a new policy with the same terms. Productions company agrees to maintain continuous, uninterrupted coverage for the duration of the location agreement. The insurance shall

include coverage for any damages or injuries arising out of the use of automobiles or other motor vehicles by production company.

Production company shall maintain on file with the City Auditor a certificate of insurance certifying the coverage required by this section. The adequacy of the insurance shall be subject to the approval of the City Attorney. Failure to maintain liability insurance shall be cause for immediate termination of this location agreement by the City.

OFFICE OF THE CITY ATTORNEY

ISSUE: Review And Approval Of Workers Compensation Insurance Coverage

1. Existing Procedure

The City Attorney's Office reviews insurance coverage, and approves as to form, those satisfactory certificates that are required by the provisions of permits or location agreements authorizing activity by film companies.

2. Philosophical Approach

Approval as to form consists of a review of insurance coverage to determine if the coverage provided adequately protects the city's interest.

3. Limitations On City Role in Verification

There is no charge for the review of insurance documents.

4. Parameters Of Workers Compensation Insurance Requirements

Unless exempt, production company shall obtain workers compensation insurance coverage for all its workers, employees and subcontractors either as a carrier-insured employer or a self-insured employer, as provided by Chapter 656 of the Oregon Revised Statutes, before this location agreement is executed. A certification of insurance, or copy thereof, shall be attached to this location agreement as Exhibit , if applicable, and shall be incorporated herein and made a term and part of this location agreement. Production company further agrees to maintain workers compensation insurance coverage for the duration of this location agreement.

In the event production company's workers compensation insurance coverage is due to expire during the term of this location agreement, production company agrees to timely renew its insurance, either as a carrier-insured employer or a self-insured employer as provided by Chapter 656 of the Oregon Revised Statutes, before its expiration, production company agrees to provide the City of Portland such further certification of workers compensation insurance as renewals of said insurance occur.

OFFICE OF THE CITY ATTORNEY

ISSUE: Review Of Location Agreements

1. Existing Procedure

The City Attorney's Office reviews and approves as to form all satisfactory location agreements proposed between film producers and City Bureaus, prior to execution of these documents by the Bureaus or Council.

A sample location agreement is attached.

In order to adequately review the location agreement specifications all referenced exhibits, including insurance certificates, must accompany each request.

2. Philosophical Approach

Approval as to form means that the agreement is sufficient as a legally binding document.

3. Limitations On City Role in Verification

There is no fee for review of location agreements.

4. Turnaround Time Requirements

Usually one or two days, but possibly can be longer depending on workload.

CITY AUDITOR

ISSUE: Filing Council Documents

1. Existing Procedure

The Office Of City Auditor maintains files of all documents, including those related to the film industry, which require City Council approval. This would include, but is not limited to, permits or location agreements which are considered for approval by Council.

Following verification of adequate insurance coverage by the Film Office, in conjunction with the City Attorney's Office, the City Auditor is provided with a copy of all pertinent documents associated with the permit or agreement requested. The Auditor's Office provides the objective processing assistance that is required to bring these requests before the Council.

2. Philosophical Approach

The Auditor's Office serves in an independent role, assuring that appropriate and objective processing has occurred of all documents that are presented before Council hearings.

3. Fee Structure

There is no fee associated with the processing and filing of these documents.

BUREAU OF BUILDINGS

ISSUE: Construction Of Facades

1. Existing Procedure

All requests are coordinated through the Bureau of Transportation Engineering. The Bureau of Buildings serves in a consultant role to the Bureau of Traffic Management in cases where such consultation is appropriate.

Permits are only issued following verification by the Film Office of adequate insurance coverage and indemnity.

2. Philosophical Approach

The facade construction policy serves to guarantee the public safety. It is anticipated that the role of the Bureau of Buildings will be minimal.

3. Parameters Of Involvement

The Bureau of Buildings is consulted in all cases of facade construction where temporary structures obstruct the public right-of-way or when the public will be moving through or under the structures.

4. Permit Fee Structure

There is no permit and no permit fee for this consultation.

5. Timelines

As the Bureau of Transportation Engineering requires three weeks lead time for the review of construction plans and submission of ordinance to Council, the Bureau of Buildings consultation will occur within these three weeks.

BUREAU OF BUILDINGS

ISSUE: Excessive Noise And Special Effects

1. Existing Procedure

All requests for permits for excessive noise or special effects involving excessive noise are made through the Noise Control Officer in the Bureau of Buildings.

A location agreement, such as the sample provided by the City Attorney's Office, will be required if appropriate.

Permits are only issued following verification by the Film Office of adequate insurance and indemnity.

2. Philosophical Approach

The Noise Control Policy serves to guarantee the public health, safety and welfare, especially during normal sleeping hours.

3. Parameters Of Involvement

A. The Noise Control Office requests notice of unusual noise generating conditions.

B. Permitted noise levels vary according to zone and time. Variances (permits) may be required if noise exceeds permitted levels.

4. Permit Fee Structure

The noise variance application fee is \$25.00.

5. Timeline

Variance application/decision formally requires up to ten working days, although review can often be accomplished in one week or less.

BUREAU OF BUILDINGS

ISSUE: Inspection Of Neon Signs Or Other Electrical Signs

1. Existing Procedure

All requests are made to the Bureau of Buildings, and the Bureau of Buildings provides inspection services of temporary neons.

Inspections only occur following verification by the Film Office of adequate insurance coverage and indemnity.

2. Philosophical Approach

The Neon Inspection Policy serves to guarantee the public safety.

3. Permit Fee Structure

Inspection for any neon signs or other electrical signage is charged to the production company at the rate of \$50 per hour.

BUREAU OF BUILDINGS

ISSUE: Electrical Hookups For Directly Accessing Power

1. Existing Procedure

All requests for accessing power directly from panels are made through the Bureau of Buildings.

Inspections are only made following verification by the Film Office of adequate insurance coverage and indemnity.

2. Philosophical Approach

The Electrical Hookup Policy is designed to guarantee the public safety.

3. Permit Fee Structure

Inspection of any electrical hookups in which electricity is accessed directly from panels will be charged at the rate of \$50 per hour.

BUREAU OF ENVIRONMENTAL SERVICES

ISSUE: Holding Tank Discharge Into The Sanitary Sewer

1. Existing Procedure

Special Discharge Permits for the discharge of holding tanks into manholes are obtained through the Bureau of Environmental Services (copy attached).

The Bureau provides informational maps if needed to assist in providing this service at the nearest sewer manhole that is designated for this purpose. The Bureau works with the film production company to identify appropriate locations and times for discharge of tanks.

A representative from the Maintenance Bureau will meet the permittee at the designated manhole and will observe that proper traffic control measures are used and that cleanup is properly conducted.

The Bureau of Environmental Services will also provide, upon request, referral information for other options for discharge, including private companies, recreational vehicle camps, and other arrangements not included in the arrangements made through this permitting process.

Special Discharge Permits are only issued following verification by the Film Office of adequate liability insurance and indemnity.

2. Philosophical Approach

The Special Discharge Policy is designed to allow the permittee to discharge sanitary waste in as convenient a manner as possible, while assuring that proper measures are taken for safety, health, and equitability.

3. Fee Structure

\$45.00 for each discharge event. The permittee may purchase as many "events" with each permit as he needs.

4. Parameters Of Discharge

Only liquid wastewater emanating from domestic sewage sources such as restrooms, drinking fountains, kitchens, shower, etc.

Only the Environmental Protection Agency approved chemicals used for odor control may be added as preservatives to holding tanks. Proper dosage of chemicals must be followed to prevent deleterious conditions in the public sewerage system.

FILM AND VIDEO OFFICE

ISSUE: Requests For Permits From The City of Portland

1. Existing Procedure

All new requests for assistance or information need to be made and coordinated through the City of Portland Film and Video Office.

The following steps are necessary:

- A. A representative from the film company will place a call to the designated permit representative of the City Film and Video Office.**
- B. The Film Office will determine the nature of the requests, anticipate their basic impact on the City and its resources, and make a determination as to the necessity of preproduction meetings or direct referrals to bureaus.**
- C. The film company must provide all information to the Film Office that is necessary to determine the level of assistance needed by the City. In the case of full-length films, this requirement will include provision of script copy.**
- D. The film company must provide an insurance certificate to the Film Office which guarantees adequate insurance coverage and indemnity. This insurance certificate is assessed and approved or disapproved by the City Attorney's Office.**
- E. In cases in which the impact on the public assets of the City of Portland are determined by the Film Office to be minimal in nature, the Film Office will refer the request directly to the bureau(s) concerned. The Film Office will call the designated film liaison in the bureau(s) concerned to verify the request from the film company and to verify adequate insurance and indemnity.**

It is the responsibility of the bureau(s) concerned to notify the Film Office if the requests from the film company require a greater amount of assistance in inter-bureau coordination than had been originally assumed in the referral.
- F. In cases in which the impact on the public assets of the City Of Portland are determined by the Film Office to require a greater amount of inter-bureau coordination, the Film Office will organize a preproduction meeting to insure adequate coordination in meeting the needs of film company and the City Of Portland. The preproduction meeting may involve representatives of other jurisdictions.**
- G. It is the intent Of the City of Portland to establish a one-stop permitting process rather than permit applications in each bureau,**

with bureaus maintaining their autonomy in decision-making and refinement of permit requests. Until this system is fully implemented, the Film Office will be provided with copies of all permits issued by the individual bureaus.

2. Philosophical Approach

The City Of Portland Film and Video Office serves as the central point of contact for all film permit requests. The purpose of this policy is to insure that a basic level of coordination exists in providing services to the film industry, to insure that the City's public resources are protected, and to insure that adequate community information has been provided that anticipates any difficulties that may emerge from multiple permitting.

3. Fee Structure

There is no fee for filing an application for permitting in the City Of Portland. Specific bureau permits may require permit fees and these are specified in the policies of each bureau.

The policy of no application fee may be reviewed once one-stop permitting has been implemented throughout the City of Portland.

4. Coordination With Other Agencies

It is anticipated that the State Film Office will continue to serve as the initial contact for film companies desiring to film in Oregon, and specifically as it relates to this policy, the City Of Portland.

During the recruitment phase, it is anticipated that the State Film Office will involve representative(s) of the City Of Portland Film Office with the mutual goal of establishing productive working relationships with producers and directors, as well as location managers.

BUREAU OF FIRE, RESCUE & EMERGENCY COMMUNICATIONS

ISSUE: Making Copies Of Fire Bureau Copyright Clear Training Programs For Film Production

1. Existing Procedure

All requests are made through the Fire Bureau.

When requesting copies of the programs, the individual making the requests must send the Fire Bureau two unused 60-minute 3/4 inch video tapes. One is kept in trade and the second is the tape on which the Fire Bureau records the requested program.

2. Philosophical Approach

Programs are not sold for three main reasons:

- A. Some of the programs contain footage shot by local television stations and given to the bureau for "training use only," thus the Bureau does not have the right to sell the footage.
- B. The programs are produced with public money.
- C. It is necessary to promote a cooperative relationship with other fire departments and this policy promotes that effort.

3. Fee Structure

- A. Copies of program Tapes trades as described above.
- B. Public Service Announcements (PSAs) cost of duplication.

BUREAU OF FIRE, RESCUE & EMERGENCY COMMUNICATIONS

ISSUE: Making Copies Of Our Copyright Clear Raw Stock Footage Of Actual Emergency Response Incidents For Film Production

1. Existing Procedure

All requests are made through the Fire Bureau. Requests are handled on a case-by-case basis.

2. Philosophical Approach

The Fire Bureau recognizes that its stock of raw footage is a valuable resource to the community. Copies of raw stock footage are made for individuals who have a legitimate use for the material, to be determined by the Fire Bureau following discussions with those making the requests.

At all times the Fire Bureau protects the privacy of the private citizen(s) who may be on the footage.

3. Fee Structure

A. Commercial

In the case in which the footage is to be used in a commercial a training program, the Fire Bureau requires a free copy of the finished program for the Bureau library as compensation.

B. Television Stations

No charge, as the local television stations extend the same courtesy to the Bureau.

BUREAU OF FIRE, RESCUE & EMERGENCY COMMUNICATIONS

ISSUE: Fire Bureau Equipment Rental

1. Existing Procedure

All requests for rental of equipment are coordinated by the Bureau of Fire, Rescue, and Emergency Services. Production companies are required to sign a letter of agreement which details the property loan parameters.

Property is only loaned following verification by the Film Office of adequate insurance coverage and indemnity.

2. Philosophical Approach

The Bureau has strategically located fire stations housing specific equipment based on fire risk analysis and loss trends. Older equipment is held in reserve at key locations to augment or replace in-service equipment.

3. Permit Fee Structure

A. Reserve Fire Engine (Pumper) \$50 per hour, plus staff at time and a half.

B. First Line Fire Engine \$150 per hour, plus staff at time and a half

C. Staff: Means a normal crew, which includes an officer (usually a lieutenant) and three fire-fighters. As we do not have the staff for on-duty details to standby for filming, staffing would require off-duty personnel. The contract requires 1 1/2 times hourly rate for four hours minimum or about \$350 to \$380 for a full crew. An alternative would be one fire-fighter to man and operate the fire engine/pumper at a cost of about \$21 per hour (four hours minimum), plus the cost of the fire engine.

BUREAU OF FIRE, RESCUE & EMERGENCY COMMUNICATIONS

ISSUE:Permitting For Special Effects

1. Existing Procedure

All requests for special effects permitting are made through the Bureau of Fire, Rescue and Emergency Services. The Bureau may, in certain cases as appropriate, refer the film producer to the State of Oregon for compliance with state law and permitting regulations. Permits are only issued after verification by the Film Office of adequate insurance coverage and indemnity.

Where appropriate, a location agreement such as the sample provided by the City Attorney, may be required.

2. Philosophical Approach

The purpose of the Special Effects Policy is to maintain the safety of persons or property during filming through regulation of unusual/ additional hazards brought to buildings or the community.

3. Permit Fee Structure

City permit fees for special effects usage vary according to site review, site supervision requirements, and other factors as determined by the Fire Bureau.

The use of polytechnics may also require state permitting. The Fire Bureau will refer to the State of Oregon in these cases.

4. Notification Requirements

The Fire Bureau, along with the Film Office, may require notification of affected parties by the film company to be determined by the Bureau and the Film Office. The notification requirements will be included in permitting and will be handled on a case-by-case basis.

5. Recommendation

The Task Force recommends that clear policies be established statewide for regulation or certification for performance of special effects.

BUREAU OF FIRE, RESCUE & EMERGENCY COMMUNICATIONS

ISSUE: High-rise Filming

1. Existing Procedure

No permitting is required for high-rise filming, but the Fire Bureau requests notification in all cases.

2. Philosophical Approach

The Bureau of Fire, Rescue, and Emergency Services is assigned the responsibility of fire prevention, and this notification allows for the appropriate questions to be asked to the producer to guarantee the public safety. In an emergency, responding fire-fighters are alerted to unusual conditions such as filming.

3. Definition of Terms

A "high-rise" building is defined as one having eight or more floors as a rule of thumb.

4. Permit Fee Structure

None for filming (see special effects)

BUREAU OF FIRE, RESCUE & EMERGENCY COMMUNICATIONS

ISSUE:Re-routing With Street Or Bridge Closure

1. Existing Procedures

All requests for re-routing of traffic during filming that affect emergency response vehicular traffic must be made through the Fire Alarm Dispatch.

Fire Alarm Dispatch will work with other agencies to establish alternate response routes.

In the case that bridges are involved, other agencies such as the Coast Guard, Multnomah County Bridge Maintenance, Tri-Met, and the Harbor Master must be notified.

2. Philosophical Approach

Routes for emergency response for both fire and medical must be maintained at all times.

3. Permit Fee Structure

None

**OFFICE OF FINANCE AND ADMINISTRATION
RISK MANAGEMENT DIVISION**

ISSUE: Identification Of Potential Risks For The City Of Portland

1. Existing Procedure

The Risk Management Division may, in select cases, provide consultation to the Film Office when potential filming risks require a more detailed analysis of potential liability. The Division will make recommendations in these cases as to performance bonding and other forms of damage repair guarantees.

The Division responds in these cases to questions identified by the Film Office and requires script analysis in order to provide this service.

2. Philosophical Approach

Risk Management wishes to protect the City and its citizens from hazardous exposure or injury as a result of preparing to film, filming and /or clean up (or lack of clean up) after filming. At the same time, Risk Management wishes to encourage the use of the Portland area as a stage for filming and video taping. It is to the advantage of both the City and the film industry to work together for safe, efficient and creative filming.

Risk Management may recommend that the City limit or prohibit some activities which are, or may result in, extraordinary exposure to property damage or injury to the City or its citizens.

All activities relative to the filming will need to be covered by appropriate insurance purchased and maintained by the filming company. We want to have the filming companies in Portland, but wish to transfer the risk to their insurance coverage.

3. Fee Structure

There is no fee associated with the consultation of the film office in these cases.

**OFFICE OF FINANCE AND ADMINISTRATION
TREASURY DIVISION**

ISSUE: Establishment of Trustee Accounts

1. Existing Procedure

The Treasury Division establishes trustee accounts for a variety of reasons as a method of holding funds that serve as guarantees but do not belong to the City of Portland.

The procedure is as follows:

- A. Film company representative works with the controlling agency (bureau) to determine specific conditions that must be attached to the trustee account.
- B. The controlling agency (bureau) formally requests in writing the establishment of a trustee account by the Treasury Division. This request shall include specimen signatures from the bureau of authorized signatories.
- C. Funds shall be released back to the film company upon receipt of written request from the authorized signatories in the controlling agency (bureau).

2. Definition Of Terms

A trustee account is established to hold funds in the Treasury Division that are not the property of the City of Portland.

The amount in the trustee account is not recognized as revenue by the City until the dollars have been transferred from the trustee account to one of the many City revenue accounts.

3. Fee Structure

There is no fee associated with establishment or administration of a trustee account. There is no interest that is accrued from the trustee account.

4. Conditions

All conditions related to the trustee account are established in the initial request by the controlling agency (bureau).

BUREAU OF GENERAL SERVICES

ISSUE: Use of City-owned Vehicles in Film Production

1. Existing Procedure

Request for city-owned vehicles are made through the Police Bureau in the use of police cars or the General Services Bureau in the case of other types of cars. Production companies are required to sign a letter of agreement which details parameters.

It is recognized that other city bureaus will serve as the initial contacts for other types of motorized vehicles (for example: water trucks, cherry pickers, etc.).

City vehicles used by film producers is only allowed following verification by the Film Office of adequate insurance coverage and indemnity.

2. Philosophical Approach

The Bureau of General Services attempts to work with film producers to make vehicles available when possible and when the use of these vehicles will not limit other functions of service provision.

3. Permit Fee Structure

Automobile rentals: [Under study]

4. Other Concerns

The Bureau will consider requests for alteration of vehicle exteriors (for example: application of temporary decals, etc.) on an individual basis.

**BUREAU OF GENERAL SERVICES
(In-Complete)**

ISSUE:Referral to Other Service Providers

1. Existing Procedure

The Bureau of General Services provides referral services for film production companies when requested.

2. Philosophical Approach

The Bureau attempts to work with film producers to refer to other providers of services that relate to its unique function in city government.

3. Parameters Of Referral Assistance

The Bureau offers referrals in the following areas:

A. Communications System Vendors

B. Printing and Graphics Vendors

4. Permit Fee Structures

No fees are associated with referrals.

BUREAU OF GENERAL SERVICES
(In-Complete)

ISSUE: Use of City-Owned Facilities

1. Existing Procedure

Contacts related to use of city-owned facilities are coordinated through the Bureau of General Services. The production company is required to sign a letter of agreement which details property use parameters. A sample agreement is provided by the City Attorney's Office. Property use can only be allowed following verification by the Film Office of adequate insurance coverage and indemnity.

2. Philosophical Approach

The Bureau of General Services maintains an inventory of city-owned property which may be of use to film producers. (The area needs completion).

3. Permit Fee Structure

There are no fees associated with the utilization of city-owned facilities, although a damage deposit, performance bond or other form of guarantee may be required prior to use.

4. Pre-empting Others Uses

The Bureau of General Services works closely with city-owned facilities to determine availability, parameters of use, and any other factors.

5. Notification Requirements

[Policy on notification is under development]

BUREAU OF GENERAL SERVICES
(In-Complete)

ISSUE: Use of Police Vehicles Light Bar in Filming

1. Existing Procedure

Requests for use of police vehicle light bars are coordinated through the Bureau of General Services. Use of this or other city property is only allowed following verification by the Film Office of adequate insurance and indemnity.

2. Philosophical Approach

Policy are under review at this time.

3. Permit Fee Structure

There is no fee associated with the use of police vehicle light bars.

BUREAU OF HYDROELECTRIC POWER

ISSUE: Use of Hydroelectric Facilities

1. Existing Procedure

All requests for use of hydroelectric facilities are made through the Bureau of Hydroelectric Power.

All requests are considered individually for the following reasons:

- A. The Portland Hydroelectric Project is located within the Bull Run Watershed which by federal law is closed to the public.**
- B. Bureau facilities are operated by Portland General Electric and require coordination for access by anyone directly related to project operation.**
- C. Hydroelectric power generating facilities are potentially dangerous places and require Bureau and operating staff to accompany anyone visiting the sites.**

Where appropriate a location agreement, such as the sample provided by the City Attorney, may be required.

2. Philosophical Approach

The Bureau will look favorably on any request which is in the best interest of economic development for the Portland area and which protects the public assets of the city.

3. Permit Fee Structure

Each request is considered individually and fees are set accordingly.

BUREAU OF PARKS AND RECREATION

ISSUES:Permits for Filming in Portland Parks

1. Existing Procedures

All requests for film and video productions for use of parks are handled through the Parks Bureau's permit system. Parks foremen work directly with the film crews to meet their needs and to minimize the impact to either the park or the public. Permits are only issued following verification by the Film Office of adequate insurance coverage and indemnity. Where appropriate a location agreement, such as the sample provided by the City Attorney, may be required.

2. Philosophical Approach

The permit policy was initiated in an attempt to minimize impact to our parks and to public usage of the parks, while allowing for legitimate film production needs to be efficiently handled.

3. Permit Fee Structure

A. Application Fee \$25.00 Paid 3 weeks in advance.
\$50.00 paid less than 3 weeks in advance.

B. Additional Fees

(1) Film/Video

Major Parks \$100	1 to 5 Hours Use
\$200	6 to 10 Hours Use
\$300	11 to 15 Hours Use
\$400	Over 15 Hours Use

Minor Parks Charged at 50 percent of the above listed fees for major parks.

(2) Still Photography

Major Parks \$50	1 to 5 Hours Use
	\$100 6 or More Hours Use

Minor Parks charged at 50 percent of the above listed fees for major parks.

C. Discounts

On long-term shoots (greater than one day), a ten percent discount will be offered for filming Monday through Thursday, during time of lower public usage.

D. Exceptions

Pittock Mansion	Japanese Garden
Portland International Raceway	Leach Garden
	Sellwood Church

4. Permit Turnaround Time Requirements

- A. Still Photography: 2 hours unless special requests are involved. (Special requests include all parks property listed under exceptions above.)
- B. Film and Video: 8 hours for shoots lasting less than one day and without special requests. (Special request include all parks property listed under exceptions above.)

48 hours for long-term shoots with or without special requests.

Facilities listed under the Exceptions section have separate policies with distinct turnaround requirements.

The above hours listed are working hours only, and do not include weekends.

5. Performance Bonding And Damages

A. \$5,000 bond may be required for all film and video groups using parks facilities, to be determined by the extent of potential for damage to parks facilities as determined by the Parks Bureau staff.

Any damages entailed or temporary construction allowed must be repaired within three days following shooting. If the damages are not repaired within three days, the Bureau will contract for the repairs or utilize Parks employees for the repairs at a rate of \$50 per hour. Repairs will be charged against the \$5,000 performance bond.

In lieu of performance bonding, a deposit into a trustee account may be required.

6. Additional Staff Costs

There is no charge for routine, informational meeting with the Parks Bureau employees.

In the case that the Parks Bureau needs to utilize part-time employees to cover operations while regular employees assist with filming, such costs will be passed on to the permittee.

7. Pre-empting Prescheduled Parks Events

The Bureau will amend normal operation in facilities, where possible and when determined by the Bureau, to accommodate filming.

The Bureau will not pre-empt other permit holders from Parks property for filming. If possible, the Bureau will attempt to move these permit holders to another appropriate site.

8. Notification Requirements

When engaging long-term shoots, defined as greater than one day, or when closing a Parks road, film companies will be required to post signs in areas designated by the Parks foreman.

Additional notification may be required as determined by the Parks Bureau in cases of special requests.

BUREAU OF PARKS AND RECREATION

ISSUE:Building Temporary Facilities

1. Existing Procedures

All requests for construction of temporary facilities on Parks property are made through the Parks Bureau permit system.

Permits are only issued following verification by the Film Office or adequate insurance coverage and indemnity.

The process is as follows:

- A. Attach all documentation regarding construction of temporary facilities to the permit application for Parks usage.**
- B. Parks foreman will review this documentation and make contact with the representative of the film company.**
- C. The request will be granted or denied based on the above documentation, amount of disruption anticipated to public use of the Parks property, and potential damage associated with the construction.**

2. Permit Fee Structure

See policy detailing the permit fee structure for Filming in Portland Parks.

3. Performance Bonding

See policy detailing the performances requirements for Filming In Portland Parks.

BUREAU OF PARKS AND RECREATION

ISSUE: Use of Steam Locomotives in Filming

1. Existing Procedure

All requests for film and video production use of steam locomotive are made through Parks Bureau Permit Center, followed by discussions with a single point of contact. The agreement currently requires Council approval.

2. Philosophical Approach

The policy was initiated in order to encourage use of these unique pieces of equipment by the film industry on a cost-recovery basis, and protect this unique public resource for future use.

3. Equipment Available

A. SP 4449 - Currently Available

B. SP & S 700 - Anticipated to go on line in Summer, 1990.

The City of Portland provides only the engine and its tender. Numerous pieces of vintage freight and passenger equipment are available in the Portland area. The City's contact person can provide assistance in making the appropriate contacts.

The film company must make its own arrangements with the railroad company which owns the tracks. The City's contact person can provide assistance in making appropriate contacts.

4. Fee Structure

The City charges \$200/day or part thereof (steaming up the engine requires two days start up and one day shut down.)

In addition the use must pay all other associated costs. Local operation (within 100 miles of Portland,) requires \$700/day engine crew costs, not including any railroad crew charges. Fuel oil costs are estimated at \$1,000/day but varies according to actual running time (500-800 gallons of fuel per day plus 10 gallons per mile). Operation at greater distances than 100 miles from Portland costs about \$100/mile including crew, fuel, insurance, railroad charges, and the cost of other railway cars.

5. Additional Conditions

The railroad companies may require additional insurance for operation on privately owned property. Typical requirements are between \$3-5 million insurance limits for non-passenger operations.

The locomotives can be painted or alter slightly as long as the user agrees to pay for the change and for the restoration to its original condition.

An experienced crew of five individuals is required for operation and maintain the engine and regulate its at night.

6. Recommendations

The Task Force recommends that the process for permitting use the steam locomotive be changed to allow for over-the-counter permitting with the guidelines established by the Bureau of Parks and Recreation.

BUREAU OF PARKS AND RECREATION

ISSUES: Use of Maintenance Equipment by Film/Video Industry

1. Existing Procedures

All requests for film and video productions for use of Parks equipment are made through the Parks Bureau's permit system, followed by referral to a single point of contact for the piece of equipment.

Use of Parks equipment is only allowed following verification by the Film Office of adequate insurance coverage and indemnity. Where appropriate, a use agreement will be required.

2. Philosophical Approach

The Bureau of Parks and Recreation adopts the policy of minimizing the disruption to City services while making available to the film and video industry units of equipment that are not readily available commercially or from other city bureaus.

3. Types of Equipment

The Bureau of Parks and Recreation can provide the following types of Park maintenance equipment

- Gang Mowers (street legal)
- Trim Mowers (must be trucked)
- Boom Trucks
 - bucket
 - high ranger
- Tree Spades (must be trucked)

4. Fee Structure

- n City equipment will be made available on a full cost recovery basis:
- n Each unit is provided with an operator.
- n Charges for the equipment with operator is made in full hour increments with a four hour minimum in "off shift" hours and an eight hour minimum during normal working hours.
- n Hourly rates are established by the Bureau of Parks based upon General Services charges (or capital and operating costs for non-fleet equipment), fuel costs and annual billable hour labor costs (adjusted for overtime rate as required by applicable labor agreement).

Coordination:

The Bureau will provide a single point of contact for equipment requirements.

- n Two to five day lead time is required for the use of city equipment.
- n City maintenance work has priority.
- n "Off shift" use is first preference (to minimize disruption of city services). If equipment units are required during normal working hours, arrangements will be made to make up city work on overtime basis.

Discounts:

- n On long-term shoots (greater than one day), a ten percent discount will be offered for filming Monday through Thursday, during time of lower public usage.

Exceptions:

Pittock Mansion	Japanese Gardens
Portland International	Leach Garden
Raceway	Sellwood Church

4. Permit Turnaround Time Requirements

- A. Still Photography: 2 hours unless special requests are involve., (Special requests include all parks property listed under expectations above.)
- B. Film and Video8 hours for shoots lasting less than one day and without special request. (Special requests include all parks property listed under exceptions above.)

48 hours for long-term shoots with or without special requests.

Facilities listed under the Exceptions section have separate policies with distinct turnaround requirements.

The above hours listed are working hours only, and do not include weekends.

BUREAU OF PARKS AND RECREATION

ISSUES: Filming at the Pittock Mansion

1. Existing Procedures

All requests for film and video productions for use of the Pittock Mansion are routed through the Parks Bureaus permit system. The Bureau works directly with the Pittock Mansion Staff, Advisory Commission, and Society in making all decision related to use of the mansion for filming. The specifics of decision-making between these bodies are detailed in City Code, Section XX, and other contracts related to operation of the facility. Permits are only issued following verification by the Film Office of adequate insurance coverage and indemnity.

2. Philosophical Approach

he permit policy was initiated in an attempt to allow limited use of the Pittock Mansion and its collections for the purpose of filming, but only in the context of the greater goal of preservation of the Mansion for future generations.

3. Permit Fee Structure

A. Application Fee

\$25.00	Paid 3 weeks in advance.
\$50.00	Paid less than 3 weeks in advance.

B. Additional Fees Negotiated on an individual basis, according to fee structure established by City Code, Section XX and conditions of use.

4. Permit Turnaround Time Requirements

A. Less Intense Uses 7-day lead time

B. More Intense Uses 90-day lead time

The differentiation of these two uses will be made by the Parks staff, following discussions with interested parties associated with the film company. The Pittock Mansion Advisory Commission and/or Society may be consulted, if Parks Bureau staff feels that this consultation is prudent.

5. Other Conditions

- A. Filming will only be permitted for short periods of time, to be determined by Parks staff, Pittock Mansion Advisory Commission and the Pittock Mansion Society.
- B. No filming will be allowed during the following peak use periods:
 - (a) The entire month of December
 - (b) Memorial Day through Labor Day
- C. Damage and cleaning deposits, or bonds may be required as described under Permits for Filming in Portland Parks, though the exact amounts of deposits or bonds are negotiable and may be greater than \$5,000.
- D. An evaluation will be required of the film company's ability to provide fire prevention capability.
- E. Special liability requirements may be required, naming the Pittock Mansion Society in the policy.
- F. No smoking will be allowed in the Mansion during filming at any time.
- G. Conditions for voiding the contract shall be spelled out in the contract by the principals.

BUREAU OF PLANNING

ISSUE: Assistance with Location Scouting

1. Existing Procedure

The Bureau of Planning provides a minimal level of assistance to film producers interested in assistance in location scouting and the development of location photo files in the City of Portland.

Assistance is only provided following verification by the Film Office of adequate insurance coverage and indemnity.

2. Philosophical Approach

The Bureau of Planning recognizes the importance of supporting the development of the film industry. It will provide assistance as it is capable within the context of limited availability of staff. The Bureau recognizes that this particular function is secondary to tasks associated with planning.

3. Fee Structure

The Bureau views a limited amount of assistance in this area as part of its basic public service, requiring no additional fees.

4. Parameters of Assistance

The Bureau will provide this service no more than four hours per month, and as a partner with projects being developed by the City of Portland Film Office.

BUREAU OF POLICE

ISSUE: Role of Police Officers When Hired By Production Companies

1. Existing Procedure

The Police Bureau coordinates all requests for the use of off-duty officers by film production companies. The deployment of officers is contingent upon verification by the Film Office of adequate insurance coverage and indemnity.

2. Philosophical Approach

Officers are made available to film production companies in order to assist them in enforcing the permits issued by the city to operate on and impede public access to public rights-of-way. It is not the intent of the Police Bureau to make officers available to serve as security guards to protect equipment, etc. Production companies purchase an enhanced level of service from the city, and do not detract from the on-duty responsibilities of public safety.

3. Definition Of Roles

The principle role of police officers in working with production companies involves traffic and crowd control. When production companies "hire" officers they are purchasing an enhanced level of police services from the city. Though this enhanced level of service is being paid for by the production companies, the officers are working for and on behalf of the City of Portland rather than the production companies. It is the expectation that officers will receive some direction from production company representatives; however, such direction should be appropriate to the officer's principle role of enforcing the city's permits.

If the production company requires assistance in enforcing a permit when an officer is not present, they should either contact the issuing agency or call 911 for police assistance. However, it should be noted that assistance in enforcing a permit, particularly where there is no immediate threat of violence, would be considered a very low priority incident by the Police Bureau and this would be reflected in the response time by the Bureau.

4. Fee Structure

Officers are paid at the overtime rate. The city receives reimbursement from the production companies for the overtime expense plus employee benefit costs.

POLICE BUREAU

ISSUE: Level of Police Staffing for Film and Video Productions

1. Existing Procedures

The Police Bureau and Bureau of Traffic Management work together to determine the appropriate levels of traffic control necessary to guarantee the public safety.

In all cases of major intermittent street closures, or traffic control, the Police Bureau works with the Bureau of Traffic Management and the production staff to establish minimum staffing levels and to lay out traffic diversion patterns.

The Police Bureau reserves the right to require additional officers depending on the type of event that is being supported. Street closure permitting is contingent upon Police Bureau agreement as to staffing needs.

The deployment of police officers is contingent upon verification by the Film Office of adequate insurance coverage and indemnity.

2. Philosophical Approach

The policy is designed to ensure that there is sufficient police support to protect the safety of the public, production crew, and officers, and to minimize any inconvenience to the public. The fees are designed to recover costs associated with personnel or equipment.

3. Permit Fee Structure

The production company is billed by the Police Bureau for the officer's overtime and fringe benefits plus any supplies that may be used.

4. Personnel Requirements

Decisions about use of off-duty police officers or flaggers in situations requiring traffic control are made between the Police Bureau and the Bureau of Traffic Management based on the particular impact of the production.

5. Enforcement

It is the role of a uniformed police officer to enforce traffic control agreements (as specified in the permit) at the site of production.

It is the responsibility of the officer on site to request information dealing with parameters.

POLICE BUREAU

ISSUE: Use of Police Bureau Equipment

1. Existing Procedure

The City Code requires City Council authorization to loan city property to non-city entities.

Production companies are required to sign a letter of agreement, sample attached, which details property loan parameters. Property is only loaned following verification by the Film Office of adequate insurance coverage and indemnity.

2. Philosophical Approach

The Police Bureau recognizes that the costs associated with overtime of off-duty officers in film production could serve as a disincentive to filming.

In an effort to reduce costs in other ways, the bureau makes the best effort to provide additional services to film companies such as the loan of cars or uniforms.

3. Types of Equipment Provided

The Police Bureau makes the following equipment available to production companies that meet the Bureau's procedural requirements:

A. Mothballed Police Cars (four)

The Police Bureau maintains four older patrol cars that are only placed in regular service when the Bureau's fleet is depleted due to wrecks or mechanical problems.

These cars are available for loan to film production companies during times in which these vehicles are not needed to meet regular service demands.

B. Regular Patrol Cars

When possible the Police Bureau will make available regular patrol cars to assist in "driving shots." Access to these cars for this purpose is clearly secondary to other public safety needs that are the primary responsibility of the Bureau. Production companies must sign a letter of agreement in which they hold the city harmless and maintain liability and property damage insurance.

These cars will not be available to film production companies under any circumstances during peak workload periods in the precincts, approximately 3:00 p.m. to 2:00 a.m.

C. Uniforms and Related Equipment

The Police Bureau maintains a moderate size inventory of used materials that are loaned to film production companies, including uniform clothing, leather holsters, belts, hats, etc.

A letter of agreement is required for the loan of uniforms or related equipment.

D. Radios

4. Fee Structure

There are no fees associated with the use of equipment described in this policy.

5. Restrictions On Use Of Equipment

Equipment described in this policy must be used within the City of Portland in order for the conditions described in the policy to be applicable.

6. Recommendations

A. The Task Force recommends that City Code be amended to allow the Police Bureau manager to loan equipment to film production companies without having to obtain City Council approval.

B. The Task Force recommends that City Council address the policy question of use of city-owned equipment outside of city limits.

POLICE BUREAU

ISSUE: Use of The City of Portland and Bureau of Police Name, Logo and Portland Bureau of Police Badge in Film Production

1. Existing Policy

City Code 14.24.010 prohibits the use of the badge or any other representation of a police officer. It expressly prohibits anyone other than a police officer to use a vehicle which is marked with the word "police."

2. Philosophical Approach

The policy was implemented in order to control use of the Bureau logo and prohibit the impersonation of a police officer. The policy unintentionally helps to avoid any potential implications of commercial endorsement on behalf of the Bureau and precludes the necessity of requiring editorial approval of scripts in order to prevent the casting of the City and Bureau in a negative context.

3. Recommendations

The Task Force recommends that Council adopt a policy that allows for some flexibility in enforcement of City Code 14.24.010. This flexibility should allow use of Police Bureau vehicles, and other equipment, as long as there is no reference to the City of Portland Police Bureau on the vehicles or equipment being utilized by film companies. The Council should maintain its opposition to the use of the logo or City of Portland property for commercial endorsement purposes.

BUREAU OF TRANSPORTATION

ISSUE: Traffic Control for Street Closures

1. Existing Procedures

BTM coordinates all requests. They work with the site production manager to determine the appropriate level of traffic control necessary for safety. Specific date and time restrictions are dictated by location site specifics, and the production company is responsible for supplying traffic control devices and police officers. Permits are only issued following verification by the Film Office of adequate insurance coverage and indemnity.

2. Philosophical Approach

The traffic control policy serves to minimize disruption to vital public transportation facilities and to compensate for public costs required to accommodate the film and video industry. BTM cooperates with other jurisdictions and agencies to insure adequate coordination in the provision of services to the film industry.

3. Types Of Closure

A. Short Duration - defined as intermittent closures of streets or sidewalks up to 15 minutes, to be determined by the Bureau of Transportation Management.

Written notification by the film company of adjacent property owners and residents is required, though written approval is not required.

B. Permanent Closures - defined as non-intermittent closures of streets or sidewalk.

Written approval of adjacent property owners by the film company is required prior to issuance of closure permits. Access to businesses and residents must be provided in a reasonable manner, to be defined in an agreement reached between the City, the Film Company, and the affected business or resident.

4. Permit Fee Structure

A nominal \$10 fee is charged for street or sidewalk closures per permit.

5. Interagency Interaction

BTM coordinates traffic control concerns with other necessary support agencies. This may include the Police Bureau (Traffic Division and various precincts), Maintenance Bureau, City Engineer's Office, Multnomah County, Tri-met, and ODOT.

6. Personnel Requirements

Decisions about use of off-duty police officers or flaggers in situations requiring traffic control are made between the Police Bureau and BTM, based on the particular impact of the production.

Flaggers shall meet the standards set forth in the Manual on Uniform Traffic Control Devices with Oregon Supplements (or, Work Zone Traffic Control Manual). This manual defines the requirements related to uniform, equipment, etc. Copies of these requirements can be obtained from the State Highway Department or from the City of Portland Permit Center for \$5.

7. Enforcement

The BTM recognizes the role of a uniformed police officer in actually carrying out the traffic control at the site of a production.

It is the responsibility of the officer or flagger on site to request information dealing with permit parameters as well as enforcement of permits.

8. Notification Requirements

In order to permit permanent street or sidewalk closures, written approval from all affected businesses or residents must be obtained by the film company.

In order to permit intermittent street or sidewalk closures, written notice by the film company must be provided to all affected businesses or residents no less than two days prior to shooting. The City of Portland will supply sample forms for approval or notification upon request.

9. Recommendation

The Task Force recommends that BTM and the Commissioner in charge review permit fees in order to insure that the fees charged meet the needs associated with cost recovery.

BUREAU OF TRANSPORTATION

ISSUE: Parking Control for Filming (Reserved Parking and Clearance)

1. Existing Procedure

All requests are coordinated through the Bureau of Traffic Management. The BTM staff works with the site production manager to determine the extent of parking removal necessary for a particular production. Specific date and time restrictions are dictated by the location site. Permits are only issued following verification by the Film Office of adequate insurance coverage and indemnity.

2. Philosophical Approach

The parking control policy serves to minimize disruption of businesses and residents, and to compensate for the public costs required to accommodate the film and video industry.

3. Permit Fee Structure

Parking removal permit fees vary according to rates established for different areas of the City of Portland.

A. Metered Areas - Parking removal permit costs \$7.50 per space per day, or can be permitted by the week for \$25.60 per space per week.

B. Non-Metered Areas - (To Whom It May Concern) permit is required. The one-time fee is \$7.50 per block face (approximately 200 linear feet).

C. Complimentary Parking Passes - Policy being developed.

4. Additional Services

The BTM will make best efforts to identify additional parking areas to compensate for displaced business employee parking during production.

Within reason, the BTM will make best efforts to identify additional parking areas for the long-term film production needs.

5. Notification

Written notification by the film company of adjacent property owners may be required prior to issuance of permits.

6. Recommendation

The Task Force recommends that the Permit Fee Structure for Metered and Non-metered Areas should be incorporated into the City Code.

BUREAU OF TRANSPORTATION

ISSUE: Construction of Facades

1. Existing Procedure

All requests are coordinated through the Bureau of Transportation Engineering. Permits are only issued following verification by the Film Office of adequate insurance coverage and indemnity. Where appropriate, a location agreement such as the sample provide by the City Attorney may be required.

2. Philosophical Approach

The facade construction policy serves to minimize disruption of the affected businesses and residents as well as guarantee the public safety, and to compensate for the public costs required to accommodate the film and video industry. The goal is to meet the needs of the film company as well as meet the City's needs of pedestrian and vehicular transportation.

3. Definition Of Terms

A permit must be obtained when any temporary structure is planned for construction in the public right-of-way.

4. Permit Fee Structure

The permit fee structure for construction of facades in the case of film production is the same as for any similar construction that may occur in the public right of way.

- A. Staff Review -** Charges are designed to reflect the time spent for staff review of engineer drawings, etc.
- B. Ordinance Preparation Charge -** Charges reflect the time required to prepare the required ordinance for Council.

5. Timeline

The Bureau of Transportation Engineering requires three weeks lead time for the review of construction plans as well as submission of ordinance to Council.

6. Interbureau Interaction

The Bureau of Transportation Engineering will take responsibility for interaction with other bureaus necessary for evaluation of facade construction. The Bureau of Buildings will be consulted in cases where temporary structures obstruct the public right-of-way or when the public will be moving through or under the structures.

7.Recommendation

The Task Force recommends that the process for facade construction be changed to allow for over-the-counter permitting within the guidelines established by the Bureau of Transportation.

BUREAU OF TRANSPORTATION

ISSUE: Use of City Vehicles and/or Heavy Equipment

1. Existing Procedure

No formal procedures exist. Equipment has been made available at times with some associated charges.

2. Philosophical Approach

The use of city equipment policy serves to minimize the disruption to important city services while making available to the film and video industry units that are not readily available commercially.

3. Types Of Equipment

The Bureau of Maintenance can provide (with a fee) a number of types of maintenance-related equipment, including:

- Street Flushers
- Street Sweepers
- Boom Truck (Cherry pickers)
- Assortment of trucks and other construction/maintenance

4. Fee And Charges

City equipment will be made available on a cost recovery basis, specifically:

- A. Each unit is provided with an operator.
- B. Labor is charged in full hour increments, with a four hour minimum. The rate is at the overtime rate required by the applicable labor agreement, and appropriate fringe benefits are included.
- C. Equipment is charged in full hour increments, with a four hour minimum, on a portal to portal basis. The hourly rate is that published by the Bureau of Maintenance (it is based on the Bureau of General Services charges, fuel costs and appropriate Bureau of Maintenance adjustments).

5. Coordination

Normally two to five days lead time is required to arrange for the use of city equipment. Our preference is to make the equipment available on the "off shift" as that allows normal city work to progress. If the units are required during normal working hours, then arrangements must be made to make up the city work on overtime.

BUREAU OF WATER WORKS

ISSUE: Access to Water from the City Of Portland

1. Existing Procedure

All requests for assistance by the Water Bureau are coordinated through the Water Services Officer or the Communications Services Director.

2. Philosophical Approach

The Water Bureau approaches each request for services by the film industry individually, as requests have been too few to identify patterns of request. In considering these requests the Bureau balances the need to be stewards of the vast public assets owned by the citizens of Portland with the need to be a partner in the economic development of the region.

3. Permit Fee Structure

n Water Hydrant Permits (No Waiver) \$25.00

n The Water Hydrant Permits allows for access to 5,000 gallons or less. In cases where additional needs are required, the Bureau will require deposit and metering of the water.

4. Lack of Access

The Bull Run Watershed is a closed watershed and is unavailable for utilization in filming.

APPENDIX A. INDUSTRY DATA

Entertainment

The motion picture industry is expected to show 3 percent growth in box office receipts in 1988. Led by the rapid rise in compact disc sales, revenues of the prerecorded music industry are expected to rise 10.5 percent. The homevideo industry will continue its fast-paced expansion, with combined sales and rentals projected to grow by 10 percent. Cable television revenues are expected to increase 15 percent.

Advances in technology are profoundly affecting the entertainment industry. Developments in communications hardware and software are bringing various forms of entertainment together, making them more accessible to the individual, driving the continued growth in the industries, and at the same time presenting new problems which threaten the very growth these developments have fostered.

Although the motion picture industry is deriving substantial ancillary revenues from the fast growing home entertainment industries—homevideo and cable television—it is struggling with the adverse effects these technologies have had upon theater attendance and film piracy. The music industry has welcomed the high-quality recording sound digital encoding has brought with the compact disc, but it is concerned that even newer technologies, such as the digital audio tape, could overwhelm developing compact disc markets and increase the difficulty of preventing high-quality piracy of sound recordings. While the homevideo and cable television industries are enjoying tremendous growth and are making entertainment more accessible to everyone, they have had to encode tapes and satellite signals in an effort to protect their programs from piracy.

These apparent disadvantages of technological advances are still outweighed by the exciting potential benefits. Satellite communications systems are dramatically affecting the entertainment industry's ability to reach world markets. Europe is gradually opening up its television systems to greater programming diversity as prospects for satellite and cable television transmission create a potential for reaching the entire European

market simultaneously. This is just the beginning of a process that is expanding the world market for entertainment industries. Technology is opening new doors and appears to promise more exciting developments in the near future.

MOTION PICTURES

The American movie has been and remains one of this country's most successful exports in terms of its penetration of worldwide markets. The motion picture industry makes an estimated \$1.2 billion positive contribution to the balance of payments annually.

U.S. films produced for presentation in movie houses are distributed in more than 100 countries, and American television films and programs are broadcast in over 90 international markets. Additionally, the U.S. film industry provides the vast majority of prerecorded videoprogramming for the world's burgeoning homevideo market and is a primary supplier of film programming for other new home delivery technologies, such as cable TV and direct broadcast satellites.

In 1986, the motion picture industry had a strong fall season and a record-high December, reversing the downward trend of the first half of the year and all of 1985. Box office receipts finished the year at \$3.78 billion, a nearly 1 percent increase from 1985 receipts and the second highest level in the history of the industry.

Industry slumps have traditionally lasted about 18 months, and the 1986 results followed this cyclical pattern almost perfectly. Receipts began to pick up in August and surged at record rates through the Christmas season. The momentum from 1986 carried right into 1987, with first half receipts running 23 percent ahead of receipts for the same period of the preceding year. While receipts are not believed to have maintained this rapid pace, it appears that the industry was able to sustain enough momentum to surpass receipts for the record high year of 1984. Total 1987 box office receipts are estimated at \$4.2 billion, an 11 percent increase from the 1986 level.

Trends and Forecasts: Motion Picture Theaters (SIC 783)

(in millions of dollars except as noted)

ITEM	1984	1985	1986	1987 ¹	1988 ¹	Percent Change					
						Compound Annual		Annual			
						1972-85	1980-85	1984-85	1985-86	1986-87	1987-88
Box office receipts	4,030	3,780	3,780	4,200	4,320	6.9	6.4	-6.9	0.8	11.1	2.9
Theater employment (000)	108.1	107.8	106.0	103.8	—	-1.2	-2.7	-0.3	-1.7	-2.1	—

Estimated by ITA.

SOURCE: U.S. Department of Commerce: International Trade Administration and Bureau of the Census; U.S. Department of Labor, Bureau of Labor Statistics; Motion Picture Association of America, Inc.

Theaters, Admissions, Ticket Prices

An estimated 22,765 theater screens were operating in the United States in 1986, 19,947 of them indoors and 2,818 of them drive-ins. This was an increase of 7.7 percent from the 1985 total, with indoor screens increasing 8.8 percent and drive-ins showing almost no change. The number of drive-ins has stabilized over the last few years, while indoor screens, especially large multiplex theaters, continue to grow at a steady rate. This trend is believed to have continued through 1987, with as many as 3,000 screens added by the end of the year. Multiplex theater owners' desire to spread the risk of a bad picture over several screens in the hope that successful films will more than compensate for the unsuccessful films appears to be fueling this continued growth. The trend toward consolidation in the industry also continued as some of the larger chains purchased smaller operations and motion picture distributors moved into the exhibition side of the industry.

Theater attendance in the United States totaled approximately 1.02 billion in 1986, a decline of 38.9 million or 3.6 percent from 1985 admissions. Attendance for 1987 is expected to have increased for the first time since 1984 to 1.09 billion, nearly 7 percent above the 1986 level.

Increases in movie ticket prices continued unabated in 1986, as they have for the past decade. The average box office composite ticket price in 1986 was \$3.71, 5 percent higher than in 1985. The consumer price index for admission prices, which includes not only motion pictures but also operas, concerts, and plays, rose 4.5 percent during the same time period. The average ticket price for 1987 is estimated at \$3.87, a 4.3 percent increase from the 1986 average.

Film Production

Feature entertainment motion picture starts by major Hollywood producers and independents during 1986 increased by an incredible 56 percent from 1985 starts, which had already marked a 13-year high for the industry. According to industry sources, the majors and independents combined started a total of 515 pictures worldwide in 1986, 185 more films than in 1985. After starts by major Hollywood producers declined in 1985, they rebounded to a record 161 in 1986, a 53 percent increase. (This figure includes an extraordinary 41 starts by Cannon Films, whose starts were not included in the count for the majors in 1985.) The independent studios started a record 354 productions in 1986, a 57 percent increase from their starts in 1985 and 24 more than 1985 starts by the entire industry.

Overseas starts of films by U.S. producers totaled 218 in 1986, 31 percent more than in the previous year and 42 percent of total film starts. Of the total films started overseas, the majors had 54, up 42 percent from 1985, while independents had 164, an increase of 27 percent. The number of film starts in the United States was up a significant 81 percent from the 1985 level.

Motion picture starts through the first half of 1987 were running well ahead of the total for the same time period a year earlier. Overall, 271 films were started in the first 6 months, a 38 percent increase over starts in the same period of 1986. Major producers started 84 films, about 18 percent more than in January-June 1986. Independent producers were also running well above the previous year's pace, with 187 starts through the end of June 1987, compared with 125 for the first 6 months of 1986.

International Trade

The U.S. entertainment motion picture industry, which includes firms that produce and distribute feature films, television programs, and homevideo material, relies heavily upon foreign markets as a source of income.

Because 8 out of 10 films do not recover their investment costs from showings in U.S. theaters, producers look to foreign markets—along with domestic cable, videocassette, and television sales—to provide the vital ancillary income to make a profit. Even with foreign and other ancillary income, however, 6 out of 10 films never recover their investment costs.

In 1986, worldwide feature film rental revenue received by the major U.S. distributors climbed to \$1.97 billion, according to *Variety*. This was a 13.3 percent increase from the \$1.73 billion in rental revenue received in 1985. Domestic rentals accounted for \$1.17 billion of the total, and export markets, \$798 million. The leading export market again was Japan, with \$102.6 million in film rentals, followed by France, at \$98.5 million. Canada, Germany, and Italy completed the top five, which accounted for about 64 percent of all export rentals. The top fifteen countries accounted for almost 82 percent.

An industry survey of independent U.S. distributors showed that foreign sales of motion pictures for theatrical, television, and homevideo display grossed an estimated \$410 million in 1985, a 9 percent increase from the 1984 level. While theatrical revenues fell 15 percent, television syndication and video sales increased 47 and 11 percent, respectively. Europe accounted for 63 percent of the total, and the Far East, 13 percent. The United Kingdom led all individual countries, with sales of \$123 million.

While the motion picture industry continues to be one of the strongest export industries, it is encountering an ever-widening variety of trade barriers in foreign markets. In recent years, the nature and scope of these international trade problems have changed. They now include import and screen-time quotas, subsidies, excessive taxes, restrictions of foreign remittances, and ineffective copyright protection. The trade barriers vary from country to country, as do the motivations behind them. In some instances, the purpose is a foreign government's desire to take in a greater share of the profits. In others, the intention is to protect or subsidize the local film industry. Another motive is to defend against what is perceived as a dominating foreign culture.

Historical Performance: Motion Picture Theaters (SIC 783)
(in millions of dollars except as noted)

ITEM	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984
Box office receipts	1,583	1,524	1,909	2,115	2,036	2,372	2,643	2,821	2,749	2,966	3,453	3,766	4,030
Theater employment (000)	126.7	129.9	129.3	131.2	128.5	125.2	123.1	128.0	123.9	122.0	114.8	109.5	108.1

SOURCE: U.S. Department of Commerce, Bureau of the Census; U.S. Department of Labor, Bureau of Labor Statistics; Motion Picture Association of America, Inc.

Piracy continues to be one of the major problems facing the motion picture industry. New technologies, especially vid-corecorders and cable and satellite television, have made the unauthorized duplication of videocassettes and the interception of signals easy. Industry sources estimate revenue losses from piracy at about \$1 billion annually. The motion picture industry has mounted a strong worldwide antipiracy campaign and is working with the U.S. Government to obtain better copyright protection abroad. Both Congress and the executive branch have been actively addressing this problem. For example, the U.S. Department of Commerce has established a program to identify the most serious offending countries and, through bilateral negotiations and other activities, to improve protection of copyrights and other intellectual property rights. In the past year, these efforts have begun to show some results. Taiwan, Singapore, Malaysia, and South Korea, which were once centers of pirate trade in motion pictures, have taken steps toward substantial improvement of copyright protection for U.S. films. In addition, the United States worked hard to include intellectual property protection in the current round of multilateral trade negotiations under the General Agreement on Tariffs and Trade (GATT); this will benefit the U.S. motion picture industry if an agreement can be reached.

Outlook for 1988

The record box office receipts for 1987 indicate that the public will go to movie theaters if the motion picture industry provides a range of quality, entertaining productions. With the number of production starts in 1987 racing ahead of the impressive number in 1986, there should be enough solid releases in 1988 to sustain continued growth in box office receipts. While the rate of growth is expected to match that of 1987, it is anticipated that 1988 box office receipts will increase by nearly 3 percent to another record level.

Long-Term Prospects

Despite industry concerns over the effects of homevideo, it appears that motion pictures will remain a major source of entertainment worldwide. The growth in box office receipts in 1987 was much more than anticipated and has spurred theater owners to refurbish theaters and add new screens. Production starts are reaching numbers comparable to 20-30 years ago. Movie theaters appear to be surviving homevideo competition. Their receipts are expected to continue to grow at a 3 percent annual average rate through 1992.

However, to achieve this level of success, the industry will have to continue fighting the rising costs of productions while maintaining the quality that keeps the public going to movie theaters.—Robert J. Mulligan, *Office of Service Industries*, (202) 377-4781, September 1987.

Additional References

- American Film Marketing Association, 10000 Washington Blvd., Suite S 266, Culver City, CA 90232.
- Motion Picture Association of America, Inc., 1133 Avenue of the Americas, New York, NY 10036.
- Boxoffice, RLD Communications, Inc., 203 North Wabash Avenue, Chicago, IL 60605.
- Variety, Variety, Inc., 154 West 46th Street, New York, NY 10036.
- Current Business Report: Service Annual Survey, Bureau of the Census, U.S. Department of Commerce, Washington, DC 20233.
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MUSIC

Prerecorded Music

Revenues from retail sales of prerecorded music were \$4.65 billion in 1986, up 6 percent from the 1985 level of \$4.39 billion.

Sales of prerecorded cassettes, which rose 4 percent in value to \$2.5 billion, accounted for the largest share of total revenue. Unit shipments of cassettes, however, increased only 2 percent to 344.5 million from 339 million in 1985.

Compact disc shipments, on the other hand, continued to grow at a prodigious rate. As many new compact disc manufacturers opened facilities in the United States, the problem of supply shortage has lessened although it will probably not be solved completely for another year or two because of the rapid increases in demand. Shipments rose to 53 million units in 1986 from 22.6 million in 1985, a 135 percent increase. The 1986 dollar value of \$930 million represented a 139 percent increase from the 1985 value and accounted for 20 percent of the gross dollar volume of all prerecorded music sales, almost equalling the share of long-playing (LP) albums.

Manufacturers' shipments of long-playing (LP) and extended-play (EP) albums continued the decline that began in 1980. In 1986, they fell 25 percent to 125 million units from 167 million in 1985. Unit sales of eight-track tapes and singles dropped by 51 percent and 22 percent, respectively. The dollar values of shipments of all three formats also dropped.

Demographic studies of consumer purchasing of prerecorded music conducted by the Recording Industry Association of America (RIAA) showed a switch in purchase patterns between the 15-19 year age group and the 20-24 year age group from 1984 to 1985. The former increased its share of total purchases from 15 percent to 25 percent, while the latter decreased its share from 26 percent to 15 percent. During the same period, purchases by the 35-and-over age group decreased to 26 percent of the total, down from 29 percent. The 25-34 age group's share remained stable at 25 percent, while purchases by the 10-14 age group increased from 5 percent to 9 percent.

Trends and Forecasts: Prerecorded Music

(in millions)

ITEM	1984	1985	1986	1987 ¹	1988 ¹	Percent Change					
						Compound Annual		Annual			
						1973-85	1980-85	1984-85	1985-86	1986-87	1987-88
Manufacturers' Unit Shipments	679.8	653.0	618.3	617.0	656.8	0.5	-0.9	-3.9	-5.3	-0.2	6.5
Manufacturers' Dollar Value	\$4,370.4	\$4,387.9	\$4,651.1	\$4,978.0	\$5,500.3	6.7	2.6	0.4	6.0	7.0	10.5

¹Estimated by ITA

SOURCE: Recording Industry Association of America.

The music video continues to play an important role in the industry as a marketing tool for new albums and for exposing new performers to the public. However, by itself, it is not a significant revenue producer for recording companies although this could change with development of compact video discs.

Music Royalties

Royalties collected for commercial use of a writer's song or a composer's melody provide another source of revenues in the music industry. In the United States, there are three collection societies that monitor the use of copyrighted music, collect royalties from users of music written or composed by their members, and distribute the royalties to the members. According to industry sources, the largest of the three societies, the American Society of Composers, Authors and Performers (ASCAP), collected \$252.2 million in royalties for its members in 1986, a 3 percent increase from 1985 collections. Domestic payments accounted for the bulk of the license fees collected, \$207.6 million, down 1 percent from the previous year's level. Foreign collection societies, which collect royalties for American music played in their countries and remit them to U.S. collection societies for distribution, remitted \$40.2 million to ASCAP, a 32 percent increase from 1985. Broadcast Music Inc., the second largest performance rights group, had estimated revenues of \$180 million in 1986.

International Trade Issues

The most pressing international trade issues in the music industry continue to be piracy and counterfeiting. Piracy is the copying and sale of recorded music without duplicating the packaging and without any compensation paid to, or authorization given by, the copyright holder. Counterfeiting is the copying and sale of recorded music by unauthorized manufacturers in the guise of authentic packaging.

A study prepared by the U.S. International Trade Commission in 1983 concluded that counterfeit and pirate records and tapes resulted in \$287 million in lost U.S. export sales in 1980 and \$258 million in 1982. According to more recent estimates by the International Intellectual Property Alliance, the U.S. recorded music industry is losing over \$600 million annually in domestic and export sales.

A 1985 survey by the International Federation of Phonogram and Videogram Producers placed the pirate market worldwide for prerecorded music cassettes and albums at 540 million units in 1984. By comparison, the figure for the legitimate prerecorded music cassette and album market worldwide was 1.5

billion units in 1983. Since pirates pay no royalty or studio production expenses and sell their products at much lower prices, the value of the pirate share, \$1.2 billion, was a smaller percentage of worldwide revenues than its percentage of worldwide units.

The worst geographic regions for piracy are Asia, Africa, and the Middle East. In Asia, pressure from the U.S. recording industry and the U.S. Government has resulted in substantial progress towards improved protection for U.S. recordings in several countries, including Turkey, Taiwan, and Singapore, over the last year, but serious piracy problems still exist in Indonesia and Thailand. In the Middle East and North Africa, pirate dealers control approximately 90 percent of the market. Many other African countries are estimated to have piracy rates over 50 percent. Saudi Arabia and Nigeria are cited by industry sources as particular offenders. Most of these countries either have no protection for intellectual property rights or enforcement of existing laws is so poor that pirate and counterfeit operations can flourish.

Outlook for 1988

Increased sales of compact disc players and expansion in compact disc manufacturing capacity to meet rising demand will lead to a rapid growth in compact disc sales. Because compact discs are priced higher than cassettes, albums, and eight-track tapes, industry revenues are expected to increase by 10.5 percent in 1988. Sales of all other media are expected to decline as the compact disc cuts into every sector of the prerecorded music market. An unknown factor that could have a serious effect on the market is the digital audio tape.

Long-Term Prospects

Revenues for the prerecorded music industry are expected to grow at an average annual rate of about 6 percent through 1992. Technological developments promise to provide better quality and contribute to industry growth in the long term. However, the industry is attempting to control the pace of technological advances. For example, the industry is concerned that the marketing of digital audio tapes and recorders could undercut the growing compact disc market before it has had an opportunity to mature and would considerably worsen the home taping problem that has already deprived artists of substantial compensation. Recording companies have been trying to obtain legislation that would require digital audio tape recorders to contain an anti-copying chip.

Historical Performance: Prerecorded Music

ITEM	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984
Total quantity shipped ¹	614.0	592.0	531.8	590.9	698.2	726.2	701.3	683.7	635.4	577.7	578.0	679.8
Singles	228.0	204.0	164.0	190.0	190.0	190.0	195.5	164.3	154.7	137.2	124.8	131.5
LP's/EP's	280.0	276.0	257.0	273.0	344.0	341.3	318.3	322.8	295.2	243.9	209.6	204.6
Compact discs ²	—	—	—	—	—	—	—	—	—	—	—	—
Cassettes	15.0	15.3	16.2	21.8	36.9	61.3	82.8	110.2	137.0	182.3	236.8	332.0
8-Tracks	91.0	96.7	94.6	106.1	127.3	133.6	104.7	86.4	48.5	14.3	6.0	5.9
Total shipment value ³	2,001.0	2,186.4	2,378.3	2,732.0	3,500.8	4,131.4	3,685.4	3,862.4	3,969.9	3,641.6	3,814.3	4,370.4
Singles	190.0	194.0	211.5	245.1	245.1	260.3	275.4	269.3	256.4	283.0	269.3	298.7
LP's/EP's	1,246.0	1,356.0	1,485.0	1,663.0	2,195.1	2,473.3	2,136.0	2,290.3	2,341.7	1,925.1	1,689.0	1,548.8
Compact discs ²	—	—	—	—	—	—	—	—	—	—	—	—
Cassettes	76.0	87.2	98.8	145.7	249.6	449.8	604.6	776.4	1,062.8	1,384.5	1,810.9	2,383.9
8-Tracks	489.0	549.2	583.0	678.2	811.0	948.0	669.4	526.4	309.0	49.0	27.9	35.7

¹Net, less returns, in millions of units.

²Significant compact disc shipments did not begin until 1983.

³At suggested list, in millions of dollars.

SOURCE: Recording Industry Association of America.

Nevertheless, manufacturers were expected to begin marketing digital audio tape recorders in the United States in the late fall of 1987. Because of its large recording capacity, compact size, and high-quality sound, the digital audio tape is likely to cut into the market for cassettes and albums as well as compact discs. However, its impact will not be felt immediately since recorders will probably not be priced at a level acceptable to the average consumer for several years. Its influence on industry revenues is hard to predict.—*Robert J. Mulligan, Office of Service Industries, (202) 377-4781, September 1987.*

Additional References

Recording Industry Association of America, 1020 Nineteenth Street, NW, Suite 200, Washington, DC 20036.
Variety, Variety, Inc., 154 West 46th Street, New York, NY 10036.
Billboard, Billboard Publications, Inc., 1515 Broadway, New York, NY 10036.
Amusement Business, Billboard Publications, Inc., 1515 Broadway, New York, NY 10036.

HOME ENTERTAINMENT

For many years, the commercial exhibition of motion pictures was limited to theaters. However, in the late 1950's this changed as film producers began licensing their films to major television networks for airing. In recent years, motion picture theaters have also had to compete with a variety of home entertainment systems, such as prerecorded videocassettes and pay cable television.

Homevideo

The most dramatic growth in motion picture revenue from ancillary markets has been in sales to wholesalers of prerecorded videocassettes, which has followed growth in sales of videocassette recorders (VCR's). VCR sales in the United States reached 13.2 million in 1986, bringing the number of households in this country with VCR's to approximately 35 million, almost a 40 percent penetration of TV households. Record sales of an estimated 13.4 million units in 1987 pushed these figures to 44 million households and 50 percent.

As a result of this continued growth in VCR sales, the prerecorded videocassette market, while considered an ancillary market for motion pictures, has clearly become a significant industry in its own right. In 1986, combined sales and rentals of videocassettes reached \$7.2 billion, according to industry sources, a 57 percent increase from \$4.6 billion in 1985. Of this combined total, \$1.6 billion was from sales, a 68 percent increase from the 1985 level, and \$5.6 billion was from rentals, a 53 percent increase. Program suppliers received an estimated \$2.1 billion on sales of 75 million units in 1986, which surpassed rental revenues from theatrical exhibition.

The rapid rate of growth in prerecorded videocassette sales was expected to continue in 1987. Combined sales and rentals by consumers are estimated to have reached \$10.2 billion, a 42 percent increase from the 1986 level. Revenues to program suppliers increased an estimated 33 percent to \$2.8 billion on sales of 110 million units.

The average sale price for prerecorded videocassettes declined to \$28 in 1986 from \$37.33 in 1985, and the average rental cost fell to \$2.40 from \$2.66. Cassettes in the VHS format accounted for 93 percent of combined sales and rentals, up from 84 percent in 1984. The Beta share of the market fell to 6.5

percent in 1986 from 14 percent the previous year, while Laserdisc accounted for the remaining 0.5 percent.

International Trade

The world market for prerecorded videocassettes has grown as rapidly as the market in the United States. VCR penetration has passed 50 percent in Australia and England and is over 30 percent in Japan, Germany, and several other countries. Japan had videocassette sales of approximately \$1.2 billion in 1986. In the United Kingdom, sales of videocassettes to retailers reached \$190 million in 1986, and consumer rentals brought in an estimated \$600 million. Consumer rentals and purchase revenues are expected to grow by 25 percent in 1987. Rental revenues in Germany exceeded \$460 million in 1986, according to industry sources. Sales and rentals of videocassettes have flourished in many countries where government-controlled television stations offer limited programming.

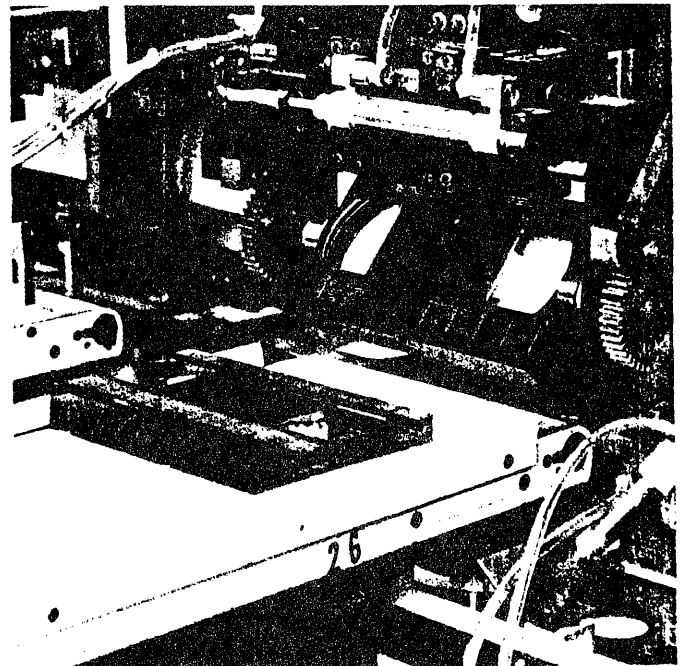
The accessibility and ease of duplication of videocassettes have greatly increased the piracy of motion pictures throughout the world. Prerecorded videocassettes are now the primary focus of industry and U.S. Government efforts to stop piracy of U.S. films in foreign countries.

Outlook for 1988

VCR sales for 1988 should surpass 1987 sales and push penetration of TV households to nearly 60 percent. As a result, unit sales of prerecorded videocassettes at wholesale are expected to grow 18 percent to 130 million. However, a decline in the average price of prerecorded videocassettes may limit the growth in revenues to \$3.0 billion, a 7.1 percent increase from the 1987 level. Combined sale and rental revenues from consumers are expected to increase 9.8 percent to \$11.2 million.

Long-Term Prospects

As VCR penetration increases, sales of VCR's are likely to slow down. Prerecorded videocassette rentals and sales will



Bell & Howell/Columbia Pictures

Tape is loaded onto VHS cassette. Half of U.S. homes with televisions now have videocassette recorders.

enjoy healthy, but slowing, growth rates for the next few years as first-time VCR owners enter the market. Business will begin to slacken by 1990 as the number of new VCR owners tapers off and existing owners use their VCR's less often. Growth in videocassette revenues to program suppliers should be sustained through 1992 at an average annual rate of 5 percent.

Cable Television

Unlike broadcast television, which derives most of its revenue from advertising, cable television derives most of its income from subscription fees. The basic cable service provides both local and cable network programming for a set monthly subscription fee. Some companies offer premium channels for additional monthly fees, as well as a pay-per-view system, billing customers only for shows actually watched.

According to industry sources, total revenues for 1986 including basic, premium, pay-per-view, home shopping, advertising, and miscellaneous revenues—were \$10 billion, a 10 percent increase from total revenues in 1985. For 1987, total cable revenues are expected to show an increase of 12 percent to \$11.2 billion, with basic cable accounting for \$5.8 billion, a 16 percent increase from 1986 revenues, and revenues for premium channels expected to be \$4 billion, a small increase. Pay-per-view, advertising, and other revenues account for the remainder.

Because of deregulation, growth in revenues was able to maintain a higher rate than growth in cable penetration of TV households. By February 1987, the number of basic cable subscribers had increased 5 percent from February 1986 to 42.8 million, accounting for 48.7 percent of television households. At this higher penetration level, the rate of increase in the number of subscribers has slowed. It is estimated that the number of basic cable subscribers by February 1988 will be 44.8 million, representing a 51.1 percent penetration rate.

International Trade

With few exceptions, such as Belgium, cable television is still in its developmental stages in most foreign countries and is often subject to government control. This, plus the U.S. industry's concern with domestic development, has resulted in relatively limited trade. However, some cable services have begun marketing their programming abroad. These efforts are likely to in-

crease as cable markets in Europe, Japan, and other countries expand.

Outlook for 1988

The number of subscribers to basic cable service is expected to increase by about 5 percent in 1988 to 47.0 million, resulting in a basic cable penetration rate of 53 percent. However, cable companies will continue to take advantage of deregulation to raise rates, which, combined with increases in advertising revenues, should result in an increase in total revenues of 15.2 percent to \$12.9 billion. Revenues from basic cable services are expected to increase 12 percent to \$6.5 billion. Revenues from premium cable services will improve slightly to \$4.3 billion as they compete with homevideo and continue to experience programming problems. A strong showing by pay-per-view and advertising revenues will account for much of the overall growth rate.

Long-Term Prospects

Cable television is expected to be in 60 percent of TV households in the United States by 1992, and total cable revenues are expected to grow at an average annual rate of 8 percent through that year. Advertising revenues should increase as cable television commands a larger share of the television market.

Over the last few years, the cable television industry has undergone tremendous growth and has seen many of the initial government regulations applied to it lifted. As the industry stabilizes and its growth rate slows, its ability to sustain growth and capture a larger share of the television market will depend more on how well its programming can compete with broadcast television and videocassettes.—*Robert J. Mulligan, Office of Service Industries, (202) 377-4781, September 1987.*

Additional References

- Electronic Industries Association, 2001 Eye Street, NW, Washington, DC 20006.
- National Cable Television Association, 1724 Massachusetts Avenue, NW, Washington, DC 20036.
- Variety, Variety, Inc., 154 West 46th Street, New York, NY 10036.
- Broadcasting, Broadcasting Publications, Inc., 1735 DeSales Street, NW, Washington, DC 20036.
- Cable Age, Television Editorial Corporation, 1270 Avenue of the Americas, New York, NY 10020.
- Video Week, Television Digest, Inc., 1836 Jefferson Place, NW, Washington, DC 20036.

Table 3a. Comparative Statistics Based on 1972 Standard Industrial Classification for Firms Subject to Federal Income Tax for the State: 1987 and 1982—Con.

[Includes only establishments with payroll. For meaning of abbreviations and symbols, see introductory text. For explanation of terms and comparability of 1982 and 1987 censuses, including revised methodology for presenting establishment counts, see appendix A. For explanation of changes in kind-of-business classifications between 1982 and 1987, also see appendix A.]

1972 SIC code	1987 SIC code	Kind of business or operation	Establishments		Receipts			Annual payroll			Paid employees for pay period including March 12	
			1987 (number)	1982 (number)	1987 (\$1,000)	1982 (\$1,000)	Percent change 1982 to 1987	1987 (\$1,000)	1982 (\$1,000)	Percent change 1982 to 1987	1987 (number)	1982 (number)
75	75	Automotive repair, services, and parking—Con.										
754	754	Automotive services, except repair	239	130	47 002	19 636	139.4	14 593	5 795	151.8	1 407	674
7542	7542	Carwashes	120	72	21 199	9 496	123.2	6 927	2 196	215.2	751	339
7549	7549	Automotive services, except repair and carwashes	119	58	25 803	10 140	154.5	7 668	3 597	113.1	656	335
76	76	Miscellaneous repair services	996	707	213 284	134 300	84.8	61 845	44 647	38.5	3 780	3 024
762	762	Electrical repair shops	253	215	60 378	38 273	57.8	18 518	13 633	35.8	1 039	985
7622	7622	Radio and television repair shops	82	99	21 156	14 290	48.0	7 170	5 075	41.3	393	406
7623, 9	7623, 9	Other electrical and electronic repair shops	171	116	39 222	23 983	63.5	11 348	6 558	32.6	646	579
7623	7623	Refrigeration and air-conditioning service and repair shops	32	26	8 168	4 754	71.8	2 357	1 619	45.6	124	83
7629	7629	Electrical and electronic repair shops, n.e.c.	139	88	31 054	19 229	61.5	6 991	6 939	29.6	522	486
763	763	Watch, clock, and jewelry repair	12	15	1 789	1 521	16.3	558	680	-18.0	39	60
764	764	Reupholstery and furniture repair	87	68	6 069	5 480	47.2	2 393	1 476	62.1	233	157
769	769	Miscellaneous repair shops and related services	544	409	143 068	89 028	60.7	40 378	26 858	39.9	2 449	1 823
7692	7692	Welding repair	60	48	12 357	7 827	55.9	4 197	2 742	53.1	195	181
7694	7694	Armature rewinding shops	46	36	28 257	18 580	52.1	7 903	6 118	29.2	438	335
7699	7699	Repair shops and related services, n.e.c.	438	325	102 454	62 519	63.9	28 276	19 998	41.4	1 816	1 307
78, 79	78 ex. 784, 79 ex. 7991 pt. 84	Amusement and recreation services, including motion pictures	613	633	291 902	202 529	44.1	75 336	51 060	47.5	8 810	7 629
781, 2	781, 2	Motion picture production, distribution, and services	66	39	31 562	10 072	213.4	7 144	2 623	172.4	387	248
783	783	Motion picture theaters	126	163	42 214	38 447	9.8	5 582	6 095	-8.4	1 264	1 343
7832	7832	Motion picture theaters, except drive-in	109	131	40 823	32 469	25.7	5 329	5 173	3.0	1 238	1 185
7833	7833	Drive-in motion picture theaters	17	32	1 391	5 978	-76.7	253	922	-72.8	26	178
791	791	Dance studios, schools, and halls	30	31	2 034	1 367	48.8	486	379	28.2	107	102
792	792	Theatrical producers (except motion picture), bands, orchestras, and entertainers	53	55	11 657	6 501	79.3	2 231	1 245	79.2	237	249
7922	7922	Theatrical producers (except motion picture) and miscellaneous theatrical services	20	18	6 638	3 547	87.1	1 366	708	82.9	121	42
7929	7929	Bands, orchestras, actors, and other entertainers and entertainment groups	33	37	5 019	2 954	69.9	865	537	61.1	116	207
793	793, 7999 pt.	Bowling centers, and billiard and pool establishments	100	110	(D)	23 443	(D)	(D)	6 683	(D)	(D)	1 202
7932	7932	Billiard and pool establishments	3	4	(D)	348	(D)	(D)	66	(D)	(D)	18
7933	7933	Bowling centers	97	106	26 256	23 095	22.4	8 199	6 597	24.3	1 043	1 185
794	794	Commercial sports	26	20	29 485	21 334	38.2	12 223	7 125	71.8	304	381
7941	7941	Professional sports clubs and promoters	11	8	16 056	7 131	125.2	8 666	3 280	164.2	170	54
7948	7948	Racing, including track operation	15	12	13 429	14 203	-5.5	3 557	3 845	-7.5	134	327
7992	7992	Public golf courses	47	32	14 073	8 424	67.1	3 927	2 224	78.8	355	270
7993	7993	Coin-operated amusement devices	66	85	17 075	14 523	17.8	3 878	3 058	26.8	319	309
7996	7996	Amusement parks	7	6	3 702	3 286	12.7	1 305	1 008	29.5	121	144
7997	7997	Membership gymnasiums, sports and recreation clubs	100	101	(D)	30 342	(D)	(D)	9 217	(D)	(D)	1 141
7999	7999 pt., 7999 pt., 84	Amusement and recreation services, n.e.c.	192	191	66 756	44 789	53.5	16 361	11 443	43.0	2 732	2 139
7999 pt.	7999 pt.	Concession operators of amusement devices and rides	7	11	4 325	4 952	-12.7	535	620	-34.8	23	59
7999 pt.	7999 pt.	Carnivals, circuses, and fairs	4	6	(D)	4 281	(D)	(D)	891	(D)	(D)	125
7999 pt.	7999 pt., 84	Other commercial recreation and amusements	181	174	(D)	35 556	(D)	(D)	9 732	(D)	(D)	1 955
80 ex. 806	80 ex. 806	Health services, except hospitals	5 558	5 236	1 834 008	1 222 061	50.0	811 628	506 747	60.2	40 785	32 384
801	801 pt.	Offices of doctors of medicine	2 285	2 305	881 586	797 484	47.5	424 499	276 359	53.6	12 510	11 125
802	802 pt.	Offices of dentists	1 581	1 625	327 540	236 928	38.2	114 284	83 141	37.5	7 267	6 283
803	803	Offices and clinics of doctors of osteopathy	100	115	21 394	14 620	46.3	9 436	6 470	45.8	426	382
8041	8041	Offices and clinics of chiropractors	398	269	66 955	27 263	145.8	18 710	6 662	180.8	1 238	586
8042	8042	Offices and clinics of optometrists	232	243	49 704	30 383	63.8	11 048	6 212	77.8	830	644
805	805	Nursing and personal care facilities	213	175	224 012	146 180	53.2	110 217	72 777	51.4	12 883	10 202
807	807	Medical and dental laboratories	223	206	73 011	50 373	44.9	31 971	20 978	52.4	1 710	1 291
8071	8071	Medical laboratories	73	71	49 578	33 426	48.3	22 859	13 273	72.2	1 150	771
8072	8072	Dental laboratories	150	135	23 433	16 945	38.3	9 112	7 705	18.3	560	520
808, 9	801 pt., 802 pt., 8043, 9, 808, 9	Other health services, n.e.c.	518	298	189 826	119 420	59.0	91 463	34 148	167.8	3 921	1 859

See footnotes at end of table.

Table 5a. Establishments and Receipts of Firms Subject to Federal Income Tax for the States: 1987—Con.

Includes only establishments with payroll. For meaning of abbreviations and symbols, see introductory text. For explanation of terms and comparability of 1982 and 1987 censuses, including revised methodology for presenting establishment counts, see appendix A.]

Geographic area	Miscellaneous repair services (SIC 76)—Con.								Amusement and recreation services, including motion pictures and museums (SIC 78, 79, 84)			
	Miscellaneous repair shops and related services (SIC 769)								Total	Motion picture production, distribution, and services (SIC 781, 2)		
	Total		Welding repair (SIC 7692)		Armature rewinding shops (SIC 7694)		Repair shops and related services, n.e.c. (SIC 7699)					
	Establishments (number)	Receipts (\$1,000)	Establishments (number)	Receipts (\$1,000)	Establishments (number)	Receipts (\$1,000)	Establishments (number)	Receipts (\$1,000)				Establishments (number)
United States ..	37 993	13 127 629	5 985	1 238 048	2 830	1 943 971	29 178	9 945 610	99 480	57 637 581	11 242	19 916 629
Alabama	612	189 686	107	16 052	69	48 958	436	124 676	1 068	321 830	48	26 572
Alaska	102	34 680	18	7 849	5	3 057	79	23 774	296	86 450	15	3 706
Arizona	526	172 141	63	11 795	42	34 844	421	125 502	1 135	523 843	65	53 216
Arkansas	381	73 053	79	8 186	43	16 563	259	48 304	762	196 266	22	26 765
California	4 146	1 561 510	564	142 024	198	114 222	3 384	1 305 264	15 795	18 901 990	5 228	11 817 456
Colorado	593	145 750	85	16 493	30	16 005	478	113 252	1 573	604 776	114	93 878
Connecticut	531	214 030	103	31 618	29	15 709	399	166 703	1 368	740 925	105	263 413
Delaware	95	57 749	13	16 691	10	3 007	72	38 051	310	103 231	17	2 991
District of Columbia	29	7 924	1	(D)	2	(D)	26	(D)	295	24 334	95	73 197
Florida	2 365	689 320	325	53 895	170	94 028	1 870	541 397	-5 212	3 757 619	332	200 907
Georgia	921	305 808	149	31 655	94	78 174	678	195 979	2 011	847 127	158	275 915
Hawa	132	30 935	12	2 822	10	2 798	110	25 315	532	229 608	25	10 177
Idaho	181	30 441	33	4 990	23	6 572	125	18 879	462	77 510	12	1 219
Illinois	1 599	639 550	224	53 129	118	94 604	1 257	491 817	4 022	2 440 983	408	988 654
Indiana	781	307 950	131	24 899	67	91 481	583	191 580	2 095	592 640	80	65 841
Iowa	511	104 123	124	14 700	50	13 530	337	75 893	1 224	296 699	32	52 551
Kansas	447	109 510	82	12 596	32	10 701	333	86 213	974	226 121	37	31 486
Kentucky	451	118 045	78	16 157	40	25 276	333	76 616	1 275	329 542	36	16 643
Louisiana	865	347 525	153	43 092	74	39 425	638	265 006	1 171	400 041	35	21 532
Maine	179	60 409	26	6 529	11	15 858	142	36 022	607	141 844	20	5 717
Maryland	628	269 956	81	18 328	30	24 753	517	226 875	1 801	766 150	135	60 641
Massachusetts	874	406 203	119	28 729	48	37 102	707	340 372	2 458	1 110 356	202	243 999
Michigan	1 367	529 019	194	56 421	100	68 154	1 073	404 444	3 436	1 447 353	184	341 815
Minnesota	648	188 680	117	32 239	55	22 433	476	134 008	1 954	678 008	127	76 742
Mississippi	356	90 619	90	13 847	37	15 283	231	61 389	616	118 425	3	(D)
Missouri	781	237 639	129	20 565	57	35 941	595	181 133	2 156	762 562	100	101 729
Montana	190	29 005	52	4 545	10	1 571	128	22 889	550	104 150	15	2 332
Nebraska	32F	65 140	87	10 033	25	7 981	216	47 126	685	163 552	19	10 298
Nevada	160	38 866	14	3 007	7	2 466	139	33 393	624	1 274 960	36	9 797
New Hampshire	220	58 514	37	10 681	11	8 984	172	36 849	597	247 493	12	2 746
New Jersey	1 329	550 452	155	39 406	78	63 441	1 096	447 605	3 007	1 522 976	207	407 031
New Mexico	238	50 335	45	6 663	18	10 397	175	33 275	518	197 348	27	7 274
New York	2 340	814 001	245	70 600	133	80 331	1 962	663 070	9 197	7 147 014	1 790	3 234 818
North Carolina	1 070	264 381	219	39 105	103	50 414	748	174 662	2 242	626 636	87	61 469
North Dakota	141	27 547	36	7 143	9	3 405	96	16 899	332	36 150	5	(D)
Ohio	1 609	664 798	229	54 052	154	178 098	1 226	432 646	4 103	1 650 528	191	277 997
Oklahoma	463	181 353	103	13 496	44	34 877	316	132 880	1 030	311 599	31	7 606
Oregon	544	143 068	60	12 357	46	28 257	438	102 454	1 150	342 267	66	31 562
Pennsylvania	1 457	601 156	250	47 477	126	125 274	1 081	425 405	3 993	1 639 115	230	230 636
Rhode Island	164	42 053	25	4 319	10	3 289	129	34 445	423	153 793	21	3 725
South Carolina	531	143 155	93	14 805	62	33 302	376	95 048	1 266	340 120	30	7 256
South Dakota	138	22 178	42	5 525	10	4 038	86	12 615	354	59 557	5	646
Tennessee	626	183 061	79	(D)	58	(D)	489	(D)	1 925	675 901	85	56 239
Texas	3 123	1 137 356	593	108 482	239	160 911	2 291	867 965	5 128	2 271 283	351	401 580
Utah	225	73 912	44	8 976	21	9 736	160	55 200	669	235 039	62	36 093
Vermont	81	13 539	9	1 365	3	1 205	69	10 969	351	279 445	14	(D)
Virginia	911	448 999	125	21 237	61	43 956	725	363 806	1 952	713 242	136	74 618
Washington	801	244 677	131	23 423	42	29 851	628	191 403	1 884	759 290	103	90 858
West Virginia	287	134 614	33	6 420	43	44 345	211	83 849	596	161 166	5	700
Wisconsin	765	235 194	121	18 354	63	39 350	581	177 490	2 007	632 548	62	24 213
Wyoming	149	38 016	58	6 078	10	12 091	81	19 847	323	51 574	9	1 862

Table 5a. Establishments and Receipts of Firms Subject to Federal Income Tax for the States: 1987—Con.

(Includes only establishments with payroll. For meaning of abbreviations and symbols, see introductory text. For explanation of terms and comparability of 1982 and 1987 censuses, including revised methodology for presenting establishment counts, see appendix A)

Amusement and recreation services, including motion pictures and museums (SIC 78, 79, 84)—Con.												
Geographic area	Motion picture theaters (SIC 783)						Video tape rental (SIC 784)	Theatrical producers (except motion picture), bands, orchestras, and entertainers (SIC 792)				
	Total		Motion picture theaters, except drive-in (SIC 7832)		Drive-in motion picture theaters (SIC 7833)			Total		Theatrical producers (except motion picture) and miscellaneous theatrical services (SIC 7922)		
	Estab- lish- ments (number)	Receipts (\$1,000)	Estab- lish- ments (number)	Receipts (\$1,000)	Estab- lish- ments (number)	Receipts (\$1,000)		Estab- lish- ments (number)	Receipts (\$1,000)	Estab- lish- ments (number)	Receipts (\$1,000)	Estab- lish- ments (number)
United States	7 776	3 977 078	6 777	3 809 209	999	167 869	16 824	2 687 138	7 847	4 904 224	3 253	2 643 391
Alabama	83	30 715	77	30 232	6	483	304	39 906	34	15 315	7	1 254
Alaska	19	14 878	19	14 878	-	-	73	14 289	7	3 225	3	(D)
Arizona	83	62 771	76	58 790	7	3 981	262	35 425	69	17 574	27	5 474
Arkansas	70	17 626	60	17 003	10	623	179	19 692	18	2 466	7	(D)
California	939	749 792	826	690 030	113	59 762	1 890	352 693	2 611	1 927 323	834	713 528
Colorado	153	71 601	133	69 074	20	2 527	246	37 682	71	20 144	35	12 414
Connecticut	91	51 303	82	50 105	9	1 198	267	51 034	98	34 051	53	23 440
Delaware	18	6 415	17	(D)	1	(D)	76	14 019	12	2 770	5	1 877
District of Columbia	27	17 271	27	17 271	-	-	36	14 271	35	(D)	23	50 034
Florida	366	199 839	344	184 364	42	5 475	840	113 526	260	108 916	126	65 770
Georgia	147	77 791	137	76 638	10	1 153	488	71 341	70	22 095	36	14 879
Hawaii	35	(D)	33	(D)	2	(D)	78	12 319	57	21 468	19	8 667
Idaho	65	14 863	54	14 227	11	636	55	7 699	3	4 456	-	-
Illinois	377	192 406	282	186 950	25	5 456	740	127 829	284	143 575	127	76 401
Indiana	164	70 151	144	65 605	40	4 546	442	60 467	60	35 413	16	11 680
Iowa	150	35 657	126	33 977	22	1 680	185	23 032	33	1 982	6	1 138
Kansas	116	34 166	100	33 001	16	1 165	175	25 136	29	4 632	11	3 143
Kentucky	105	34 668	77	32 160	28	2 528	302	40 633	34	7 222	13	4 128
Louisiana	100	50 524	97	49 342	3	1 182	212	30 560	53	22 496	17	14 067
Maine	43	12 057	36	11 819	7	216	94	14 701	23	2 602	11	1 454
Maryland	124	72 475	122	(D)	2	(D)	400	101 035	86	27 259	40	15 252
Massachusetts	162	126 401	142	125 921	20	2 460	479	88 074	112	51 458	64	40 198
Michigan	263	137 242	215	130 367	48	6 855	679	91 676	128	61 608	61	54 378
Minnesota	150	61 629	137	60 340	15	1 289	427	52 643	103	50 762	57	41 834
Mississippi	55	(D)	46	14 700	9	(D)	169	21 797	7	(D)	-	-
Missouri	166	72 938	145	70 499	23	2 439	478	71 406	131	51 828	45	20 883
Montana	65	12 707	57	12 427	8	280	86	11 099	15	1 396	9	998
Nebraska	79	21 251	65	20 182	14	1 109	69	12 057	38	5 849	16	4 052
Nevada	31	27 466	26	(D)	5	(D)	91	28 979	122	55 006	36	20 978
New Hampshire	36	16 351	30	(D)	6	(D)	137	23 288	22	3 403	14	2 924
New Jersey	187	119 411	179	118 060	8	1 351	485	75 962	250	140 946	114	55 108
New Mexico	65	24 002	62	23 128	6	874	101	15 742	22	3 088	11	1 515
New York	572	385 925	524	382 005	48	7 920	989	150 497	1 618	1 422 113	872	1 041 584
North Carolina	157	64 635	164	62 591	23	2 044	410	56 668	74	13 425	26	5 140
North Dakota	41	7 636	37	7 543	4	93	29	2 231	4	(D)	1	(D)
Ohio	353	136 006	270	128 848	83	7 158	677	93 215	118	50 743	48	28 862
Oklahoma	116	39 507	102	37 869	14	1 638	216	24 874	33	9 635	17	2 567
Oregon	126	42 214	109	40 823	17	1 391	267	38 550	53	11 657	20	6 638
Pennsylvania	354	131 652	279	124 663	75	6 969	637	125 338	185	101 816	81	48 229
Rhode Island	23	14 041	21	(D)	2	(D)	75	14 500	25	9 324	12	7 000
South Carolina	95	31 402	83	29 930	12	1 472	299	40 945	23	3 487	10	1 167
South Dakota	43	7 943	36	7 679	7	264	44	6 649	9	1 295	5	963
Tennessee	121	45 519	102	42 482	19	3 037	380	45 852	255	149 215	81	35 292
Texas	511	276 508	455	269 573	56	8 935	824	168 896	252	101 826	113	58 465
Utah	78	33 369	68	30 433	10	2 936	122	15 763	15	6 950	5	(D)
Vermont	34	8 169	26	7 806	8	363	59	9 254	13	1 009	9	709
Virginia	162	89 205	146	88 265	16	940	365	86 305	76	20 710	37	13 776
Washington	172	89 913	148	86 176	24	3 737	340	53 256	86	46 063	34	9 380
West Virginia	59	13 501	40	12 223	19	1 278	135	14 968	6	466	1	(D)
Wisconsin	176	58 974	158	57 269	18	1 705	259	32 374	110	24 480	33	10 246
Wyoming	42	6 749	31	6 436	8	313	52	6 991	5	3 092	3	(D)

Table 8a. Summary Statistics for Firms Subject to Federal Income Tax for Metropolitan Statistical Areas: 1987—Con.

[Includes only establishments with payroll. For meaning of abbreviations and symbols, see introductory text. For explanation of terms and comparability of 1982 and 1987 censuses, including revised methodology for presenting establishment counts, see appendix A. For definitions of CMSA's, MSA's, and PMSA's, see appendix D.]

1987 SIC code	Geographic area and kind of business or operation	Establishments (number)	Receipts (\$1,000)	Annual payroll (\$1,000)	First quarter payroll (\$1,000)	Paid employees for pay period including March 12 (number)	Unincorporated businesses or operations	
							Individual proprietorships (number)	Partnerships (number)
	PORTLAND-VANCOUVER, OR-WA CMSA—Con.							
78	Miscellaneous repair services	465	137 008	40 647	9 444	2 208	184	25
762	Electrical repair shops	133	41 794	13 482	3 291	671	45	8
7622	Radio and television repair shops	40	13 627	5 092	1 254	263	11	2
7623 9	Other electrical and electronic repair shops	93	28 167	8 390	2 037	408	34	6
7623	Refrigeration and air-conditioning service and repair shops	17	(D)	(D)	(D)	(D)	7	-
7629	Electrical and electronic repair shops, n.e.c.	76	(D)	(D)	(D)	(D)	27	6
763	Watch, clock, and jewelry repair	9	1 327	325	76	27	3	2
764	Reupholstery and furniture repair	43	3 955	1 313	288	129	29	2
769	Miscellaneous repair shops and related services	270	89 932	25 527	5 789	1 382	107	13
7692	Welding repair	23	(D)	(D)	(D)	(D)	10	-
7694	Armature rewinding shops	17	(D)	(D)	(D)	(D)	1	1
7699	Repair shops and related services, n.e.c.	230	84 971	17 512	4 111	1 057	96	12
7699 pt.	Farm machinery and equipment repair shops	7	(D)	(D)	(D)	(D)	4	1
7699 pt.	Lawnmower and other small engine repair	24	(D)	(D)	(D)	(D)	14	2
7699 pt.	Sewer and septic tank cleaning services	15	(D)	(D)	(D)	(D)	4	3
7699 pt.	Other repair and related services, n.e.c.	184	56 823	15 263	3 618	906	74	6
78, 79, 84	Amusement and recreation services, including motion pictures and museums	594	204 844	53 630	13 391	6 547	167	53
781. 2	Motion picture production, distribution, and services	42	(D)	(D)	(D)	(D)	7	2
7812 pt.	Motion picture production, except for television	16	(D)	(D)	(D)	(D)	3	-
7812 pt.	Motion picture and tape production for television	7	2 975	1 701	299	82	1	1
7819	Services allied to motion picture production	12	(D)	(D)	(D)	(D)	2	-
7822 pt.	Motion picture film exchanges	6	(D)	(D)	(D)	(D)	1	1
7822 pt.	Film and tape distribution for television	-	(D)	(D)	(D)	(D)	1	-
7829	Services allied to motion picture distribution	1	(D)	(D)	(D)	(D)	1	-
783	Motion picture theaters	54	(D)	(D)	(D)	(D)	1	3
7832	Motion picture theaters, except drive-in	49	25 047	3 063	693	686	-	3
7833	Drive-in motion picture theaters	5	(D)	(D)	(D)	(D)	-	-
784	Video tape rental	153	23 020	5 455	1 205	701	64	21
792	Theatrical producers (except motion picture), bands, orchestras, and entertainers	39	(D)	(D)	(D)	(D)	22	1
7922	Theatrical producers (except motion picture) and miscellaneous theatrical services	15	(D)	(D)	(D)	(D)	5	-
7922 pt.	Producers of live theatrical productions	1	(D)	(D)	(D)	(D)	1	-
7922 pt.	Producers of radio and television shows, except tape	3	(D)	(D)	(D)	(D)	1	-
7922 pt.	Artists' and entertainers' managers or agents, concert bureaus, booking agents	8	3 184	355	84	29	3	-
7922 pt.	Other theatrical services	3	(D)	(D)	(D)	(D)	-	-
7929	Bands, orchestras, actors, and other entertainers and entertainment groups	24	(D)	(D)	(D)	(D)	17	1
7929 pt.	Dance groups and artists	1	(D)	(D)	(D)	(D)	1	-
7929 pt.	Symphony orchestras, opera companies, and chamber music organizations	-	-	-	-	-	-	-
7929 pt.	Other music and entertainment presentations	23	5 584	749	217	84	16	1
7929 pt.	Other music groups and artists	18	(D)	(D)	(D)	(D)	14	1
7929 pt.	Other entertainers and entertainment groups	5	(D)	(D)	(D)	(D)	2	-
793	Bowling centers	42	16 340	5 258	1 422	644	4	6
79 ex. 792, 3, 4, 84	Commercial sports and other amusement and recreation services, including museums	264	106 081	32 378	8 511	3 010	69	20
794	Commercial sports	18	(D)	(D)	(D)	(D)	4	1
7941	Professional sports clubs and promoters	7	15 607	8 469	4 200	166	1	1
7941 pt.	Baseball clubs	-	-	-	-	-	-	-
7941 pt.	Football clubs	-	-	-	-	-	-	-
7941 pt.	Other professional sports clubs	3	(D)	(D)	(D)	(D)	1	-
7941 pt.	Managers and promoters	4	(D)	(D)	(D)	(D)	1	1
7948	Racing, including track operation	11	(D)	(D)	(D)	(D)	3	-
7948 pt.	Auto racetrack operation	2	(D)	(D)	(D)	(D)	-	-
7948 pt.	Horse racetrack operation	1	(D)	(D)	(D)	(D)	-	-
7948 pt.	Dog racetrack operation	1	(D)	(D)	(D)	(D)	-	-
7948 pt.	Racing stables and racing, n.e.c.	7	1 153	118	29	10	3	-
79 ex. 792, 3, 4, 84	Other amusement and recreation services, including museums	246	(D)	(D)	(D)	(D)	65	19
791	Dance studios, schools, and halls	18	1 609	414	104	86	9	2
7991	Physical fitness facilities	54	12 345	4 029	966	655	15	2
7991 pt.	Physical fitness centers, except gymnasiums and athletic clubs	41	(D)	(D)	(D)	(D)	13	2
7991 pt.	Membership gymnasiums and athletic clubs	10	4 305	1 446	349	206	1	-
7991 pt.	Nonmembership gymnasiums and athletic clubs	3	(D)	(D)	(D)	(D)	1	-
7992	Public golf courses	17	(D)	(D)	(D)	(D)	6	2
7993	Coin-operated amusement devices	36	9 263	1 899	478	151	8	2
7996	Amusement parks	2	(D)	(D)	(D)	(D)	1	-
7997	Membership sports and recreation clubs	35	(D)	(D)	(D)	(D)	7	4

Table 6a. Establishments and Receipts of Firms Subject to Federal Income Tax for Metropolitan Statistical Areas: 1987—Con.

only establishments with payroll. For meaning of abbreviations and symbols, see introductory text. For explanation of terms and comparability of 1982 and 1987 censuses, including methodology for presenting establishment counts, see appendix A. For definitions of CMSA's, MSA's, and PMSA's, see appendix D]

Geographic area	Miscellaneous repair services (SIC 76)—Con.				Amusement and recreation services, including motion pictures and museums (SIC 78, 79, 84)							
	Reupholstery and furniture repair (SIC 764)		Miscellaneous repair shops and related services (SIC 769)		Total		Motion picture production, distribution, and services (SIC 781, 2)		Motion picture theaters (SIC 783)		Video tape rental (SIC 784)	
	Estab-lish-ments (number)	Receipts (\$1,000)	Estab-lish-ments (number)	Receipts (\$1,000)	Estab-lish-ments (number)	Receipts (\$1,000)	Estab-lish-ments (number)	Receipts (\$1,000)	Estab-lish-ments (number)	Receipts (\$1,000)	Estab-lish-ments (number)	Receipts (\$1,000)
Little Rock-North Little Rock, AR MSA	20	(D)	101	28 561	181	60 358	13	25 656	13	6 843	38	4 073
Longview-Marshall, TX MSA	4	177	35	13 501	59	10 907	1	(D)	4	(D)	11	(D)
Los Angeles-Anaheim-Riverside, CA CMSA	429	79 084	1 920	812 070	10 511	15 608 250	4 735	(D)	435	390 621	756	133 713
Anaheim-Santa Ana, CA PMSA	82	11 811	388	162 607	803	1 193 769	96	226 051	59	57 082	138	21 429
Los Angeles-Long Beach, CA PMSA	283	60 112	1 133	528 032	8 870	13 819 529	4 583	10 539 077	299	272 489	440	82 457
Orland-Ventura, CA PMSA	15	1 356	91	28 650	216	201 512	28	(D)	19	16 542	39	6 103
Riverside-San Bernardino, CA PMSA	49	5 805	308	92 781	622	393 440	28	14 949	58	44 506	139	23 724
Louisville, KY-IN MSA	35	3 373	159	53 414	399	149 214	23	15 273	24	12 712	63	13 543
Lubbock, TX MSA	8	(D)	52	19 309	76	22 849	3	1 291	6	(D)	13	2 195
Lynchburg, VA MSA	1	(D)	20	(D)	56	(D)	1	(D)	4	2 343	10	(D)
Macon-Warner Robins, GA MSA	11	1 239	41	13 062	89	22 708	1	(D)	7	(D)	22	5 085
Madison, WI MSA	11	597	44	12 747	178	46 985	12	4 070	16	8 776	24	2 585
Manchester, NH MSA	5	1 840	32	11 354	58	20 661	1	(D)	2	(D)	15	1 979
Manfield, OH MSA	6	686	18	5 265	57	15 720	4	176	4	1 264	9	1 125
McAllen-Edinburg-Mission, TX MSA	11	(D)	32	6 084	56	19 847	1	(D)	10	2 037	11	(D)
Medford, OR MSA	6	(D)	29	6 866	75	20 626	7	(D)	7	2 883	14	1 588
Metairie-Titusville-Palm Bay, FL MSA	15	(D)	62	12 418	145	39 932	2	(D)	14	6 601	38	4 428
Mobile, AL MSA	31	4 480	152	46 781	264	139 417	18	9 428	13	11 448	47	6 685
Morristown, CA MSA	4	(D)	15	1 327	45	6 316	1	(D)	5	(D)	11	1 279
Miami-Fort Lauderdale, FL CMSA	140	15 678	657	192 107	1 345	796 589	148	97 352	99	66 232	157	22 897
Fort Lauderdale-Hollywood-Pompano Beach, FL PMSA	61	5 341	279	81 292	563	357 298	40	34 432	35	24 864	46	(D)
Miami-Hialeah, FL PMSA	79	10 337	378	110 815	782	439 191	108	62 920	64	41 368	111	(D)
Midland, TX MSA	9	506	33	11 960	34	10 153	-	-	3	(D)	6	806
Milwaukee-Racine, WI CMSA	61	(D)	274	120 365	574	200 824	35	(D)	48	(D)	85	11 538
Milwaukee, WI PMSA	53	6 167	243	110 300	500	178 256	34	12 241	42	23 705	71	10 014
Racine, WI PMSA	8	(D)	31	10 065	74	22 566	1	(D)	6	(D)	14	1 524
Minneapolis-St. Paul, MN-WI MSA	71	11 714	362	124 806	1 136	536 315	115	72 770	66	43 057	297	38 096
Mobile, AL MSA	16	(D)	98	39 320	157	43 490	6	719	9	2 313	34	3 945
Modesto, CA MSA	5	517	66	16 340	103	32 580	4	1 094	8	8 301	25	3 535
Monroe, LA MSA	7	(D)	21	9 637	33	5 198	-	-	2	(D)	9	778
Montgomery, AL MSA	14	(D)	45	12 066	72	13 810	5	671	6	(D)	18	2 448
Muncie, IN MSA	5	260	13	1 394	55	9 707	2	(D)	5	1 596	14	(D)
Muskegon, MI MSA	2	(D)	22	4 905	70	18 403	4	(D)	7	2 558	5	(D)
Naples, FL MSA	10	1 294	30	4 565	98	41 813	3	(D)	7	(D)	8	848
Nashville, TN MSA	28	6 074	153	52 751	630	325 655	43	33 682	24	(D)	85	11 075
New Bedford, MA MSA	6	448	35	11 081	62	14 148	3	282	3	(D)	13	1 769
New Haven-Meriden, CT MSA	24	2 980	84	33 623	167	44 078	11	(D)	12	9 259	28	5 505
New London-Norwich, CT-RI MSA	8	411	36	11 138	114	29 422	2	(D)	9	2 434	27	4 224
New Orleans, LA MSA	27	3 431	261	117 134	395	190 382	23	18 985	41	25 666	55	8 938
New York-Northern New Jersey-Long Island, NY-NJ-CT CMSA	528	96 316	2 778	1 068 211	9 414	7 967 060	1 949	3 809 568	515	410 407	1 112	158 690
Bergen-Passaic, NJ PMSA	46	(D)	250	94 311	606	313 089	79	55 788	42	29 838	63	11 839
Bridgport-Milford, CT PMSA	12	(D)	80	42 021	133	58 452	8	(D)	12	5 173	29	5 524
Danbury, CT PMSA	9	1 060	23	3 130	108	23 195	5	(D)	7	3 428	20	3 178
Jersey City, NJ PMSA	15	1 162	75	69 079	119	46 344	9	(D)	8	7 150	37	3 990
Middlesex-Somerset-Hunterdon, NJ PMSA	24	2 284	181	65 123	323	170 332	25	(D)	20	21 631	77	10 963
Northampton-Ocean, NJ PMSA	25	(D)	176	47 971	554	220 473	13	1 988	26	15 504	79	11 605
Suffolk, NY PMSA	106	16 618	598	174 918	1 438	698 789	123	55 540	82	78 013	206	24 652
New York, NY PMSA	216	53 381	967	399 710	5 193	5 648 695	1 580	3 153 139	257	222 045	444	62 257
Newark, NJ PMSA	53	6 619	322	149 197	592	422 405	44	(D)	37	(D)	104	15 714
Orange County, NY PMSA	7	932	22	4 820	110	48 802	30	(D)	8	(D)	10	2 647
Stamford, CT PMSA	4	(D)	43	9 706	93	18 205	5	777	7	1 997	24	2 447
Stamford, CT PMSA	11	(D)	41	6 225	145	252 179	28	(D)	7	(D)	15	3 844

Table 6a. Establishments and Receipts of Firms Subject to Federal Income Tax for Metropolitan Statistical Areas: 1987—Con.

[Includes only establishments with payroll. For meaning of abbreviations and symbols, see introductory text. For explanation of terms and comparability of 1982 and 1987 censuses, including revised methodology for presenting establishment counts, see appendix A. For definitions of CMSA's, MSA's, and PMSA's, see appendix D.]

Geographic area	Miscellaneous repair services (SIC 76)—Con.				Amusement and recreation services, including motion pictures and museums (SIC 78, 79, 84)							
	Reupholstery and furniture repair (SIC 764)		Miscellaneous repair shops and related services (SIC 769)		Total		Motion picture production, distribution, and services (SIC 781, 2)		Motion picture theaters (SIC 783)		Video tape rental (SIC 784)	
	Estab-lish-ments (number)	Receipts (\$1,000)	Estab-lish-ments (number)	Receipts (\$1,000)	Estab-lish-ments (number)	Receipts (\$1,000)	Estab-lish-ments (number)	Receipts (\$1,000)	Estab-lish-ments (number)	Receipts (\$1,000)	Estab-lish-ments (number)	Receipts (\$1,000)
Norfolk-Virginia Beach- Newport News, VA MSA	55	6 135	210	113 560	391	167 564	21	4 553	26	21 453	59	14 899
Ocala, FL MSA	6	(D)	39	9 255	71	38 560	3	1 009	6	(D)	12	1 569
Odessa, TX MSA	-	-	84	(D)	40	13 142	-	-	4	(D)	8	3 715
Oklahoma City, OK MSA	18	2 042	144	51 816	341	121 472	10	1 735	41	18 027	64	8 959
Olympia, WA MSA	4	(D)	24	3 023	69	19 360	2	(D)	6	(D)	19	3 707
Omaha, NE-IA MSA	23	2 012	109	32 943	265	115 581	16	9 823	19	11 699	34	7 800
Orlando, FL MSA	38	4 888	171	56 104	485	1 334 452	43	32 755	34	15 499	92	10 377
Owensboro, KY MSA	1	(D)	23	6 390	38	5 188	-	-	5	(D)	6	(D)
Panama City, FL MSA	6	(D)	29	4 961	83	26 490	1	(D)	5	2 602	9	958
Parkersburg-Marietta, WV-OH MSA	4	(D)	27	8 722	54	11 825	-	-	6	(D)	12	2 642
Pascagoula, MS MSA	-	-	13	6 076	35	5 103	-	-	2	(D)	15	(D)
Pensacola, FL MSA	11	(D)	53	14 067	118	27 109	5	(D)	4	4 454	32	3 107
Peoria, IL MSA	5	(D)	50	11 231	120	32 469	3	930	14	5 227	16	2 315
Philadelphia-Wilmington- Trenton, PA-NJ-DE-MD CMSA	163	(D)	817	375 762	1 927	1 032 813	164	182 634	146	78 758	386	97 809
Philadelphia, PA-NJ PMSA	134	14 665	674	290 131	1 554	905 317	139	170 315	121	66 341	296	82 682
Trenton, NJ PMSA	9	(D)	50	21 632	110	41 749	11	10 028	9	4 374	22	5 193
Vineyard-Hillville, Bridgeton, NJ PMSA	3	(D)	17	8 738	41	7 256	-	-	4	(D)	10	1 622
Wilmington, DE-NJ-MD PMSA	17	2 037	76	55 261	222	78 491	14	2 291	12	(D)	58	8 312
Phoenix, AZ MSA	62	10 741	330	123 301	672	344 789	52	48 439	38	43 176	144	18 020
Pine Bluff, AR MSA	3	196	10	1 454	23	3 982	1	(D)	3	(D)	7	(D)
Pittsburgh-Seaver Valley, PA CMSA	45	8 041	241	131 471	782	344 991	60	95 547	72	25 959	97	12 919
Beaver County, PA PMSA	-	-	20	8 157	48	10 007	2	(D)	3	(D)	6	798
Pittsburgh, PA PMSA	48	8 041	221	123 314	734	334 984	58	(D)	69	(D)	91	12 121
Pittsfield, MA MSA	2	(D)	11	3 293	44	12 616	-	-	3	(D)	10	1 572
Portland, ME MSA	11	(D)	39	19 794	127	32 216	11	4 577	7	(D)	14	2 207
Portland-Vancouver, OR- WA CMSA	43	3 955	270	89 932	594	204 844	42	(D)	54	(D)	153	23 020
Portland, OR PMSA	40	(D)	236	82 919	504	177 578	39	(D)	51	23 302	124	19 881
Vancouver, WA PMSA	3	(D)	34	7 013	90	27 266	3	(D)	3	(D)	29	3 139
Portsmouth-Dover- Rochester, NH-ME MSA	9	817	31	6 995	128	33 127	2	(D)	10	5 166	27	5 090
Poughkeepsie, NY MSA	4	(D)	26	8 624	122	28 184	6	(D)	12	3 938	23	2 338
Providence-Pawtucket- Fall River, RI-MA CMSA	57	(D)	183	43 020	420	154 423	21	3 795	21	(D)	79	(D)
Fall River, MA-RI PMSA	9	553	19	2 195	37	8 546	1	(D)	1	(D)	11	(D)
Pawtucket- Woonsocket-Attleboro RI-MA PMSA	13	1 291	51	12 246	119	58 617	2	(D)	8	6 822	15	4 567
Providence, RI PMSA	35	(D)	113	26 579	264	87 260	18	(D)	12	9 531	53	8 961
Provo-Orem, UT MSA	6	454	19	3 711	101	18 368	14	(D)	12	4 228	26	3 356
Pueblo, CO MSA	4	(D)	21	6 166	51	12 204	2	(D)	7	(D)	14	(D)
Raleigh-Durham, NC MSA	37	(D)	111	31 549	262	73 306	14	5 529	15	6 845	40	5 725
Rapid City, SD MSA	7	(D)	19	2 215	63	14 816	-	-	5	(D)	11	1 797
Reading, PA MSA	8	857	44	12 279	135	39 600	6	(D)	9	(D)	16	2 566
Redding, CA MSA	6	(D)	32	8 536	66	18 154	1	(D)	6	(D)	17	2 008
Reno, NV MSA	11	1 095	65	18 729	142	291 499	8	(D)	5	(D)	20	3 369
Richland-Kennebec, Pasco, WA MSA	5	(D)	19	4 978	49	15 694	1	(D)	7	(D)	9	1 214
Richmond-Petersburg, VA MSA	31	3 610	159	102 289	261	140 059	23	19 657	18	12 004	49	10 077
Roanoke, VA MSA	10	1 006	51	(D)	100	24 825	3	(D)	6	3 894	26	2 618
Rochester, MN MSA	4	(D)	8	2 493	40	11 721	-	-	4	(D)	4	(D)
Rochester, NY MSA	27	4 127	118	22 889	384	145 228	23	11 824	28	16 184	36	6 622
Rockford, IL MSA	12	(D)	59	15 081	83	26 686	4	645	8	5 059	11	3 032
Sacramento, CA MSA	43	6 291	220	65 079	523	293 917	30	70 442	34	31 648	150	29 920
Saginaw-Bay City- Midland, MI MSA	14	1 021	50	17 261	149	40 391	2	(D)	15	4 772	33	(D)
St. Cloud, MN MSA	8	(D)	38	7 974	97	17 428	-	-	7	(D)	17	(D)
St. Joseph, MO MSA	2	(D)	10	2 725	36	(D)	-	-	5	(D)	12	1 341
St. Louis, MO-IL MSA	79	9 228	377	144 170	1 030	427 155	68	57 061	68	38 137	207	36 661
Salem, OR MSA	8	(D)	53	7 776	88	19 073	3	(D)	12	3 143	17	2 209
Salinas-Seaside- Monterey, CA MSA	10	(D)	43	14 758	132	52 511	12	(D)	21	8 259	34	3 954
Salt Lake City-Ogden, UT MSA	26	1 939	143	49 722	412	167 314	45	32 264	44	24 683	73	10 028
San Angelo, TX MSA	5	487	30	8 622	27	7 069	-	-	5	(D)	2	(D)
San Antonio, TX MSA	49	8 628	183	53 213	375	174 055	27	(D)	26	29 426	53	22 024
San Diego, CA MSA	78	11 070	323	106 411	785	478 631	80	38 746	71	62 838	138	37 149

Table 6a. Establishments and Receipts of Firms Subject to Federal Income Tax for Metropolitan Statistical Areas: 1987—Con.

[Includes only establishments with payroll. For meaning of abbreviations and symbols, see introductory text. For explanation of terms and comparability of 1982 and 1987 censuses, including revised methodology for presenting establishment counts, see appendix A. For definitions of CMSA's, MSA's, and PMSA's, see appendix D.]

Geographic area	Miscellaneous repair services (SIC 76)—Con.				Amusement and recreation services, including motion pictures and museums (SIC 78, 79, 84)							
	Reupholstery and furniture repair (SIC 764)		Miscellaneous repair shops and related services (SIC 769)		Total		Motion picture production, distribution, and services (SIC 781, 2)		Motion picture theaters (SIC 783)		Video tape rental (SIC 784)	
	Estab-lishments (number)	Receipts (\$1,000)	Estab-lishments (number)	Receipts (\$1,000)	Estab-lishments (number)	Receipts (\$1,000)	Estab-lishments (number)	Receipts (\$1,000)	Estab-lishments (number)	Receipts (\$1,000)	Estab-lishments (number)	Receipts (\$1,000)
San Francisco-Oakland-San Jose, CA CMSA	221	31 915	881	352 045	2 388	1 549 843	313	346 027	241	192 624	473	99 865
Oakland, CA PMSA	63	8 128	332	153 478	618	333 151	54	47 858	56	62 639	132	27 532
San Francisco, CA PMSA	85	14 020	204	79 948	914	730 726	206	261 686	95	67 783	123	37 201
San Jose, CA PMSA	45	7 500	192	82 645	446	323 024	39	33 254	47	42 674	107	16 496
Santa Cruz, CA PMSA	3	(D)	25	5 516	111	51 358	7	(D)	16	5 868	30	4 396
Santa Rosa-Petaluma, CA PMSA	15	(D)	73	11 918	184	57 853	5	1 579	15	6 792	58	9 119
Vallejo-Fairfield-Napa, CA PMSA	10	(D)	55	18 540	115	53 731	2	(D)	12	6 868	23	5 141
Santa Barbara-Santa Maria-Lompoc, CA MSA	16	1 395	66	18 940	136	44 904	13	5 174	16	(D)	16	3 033
Santa Fe, NM MSA	1	(D)	14	2 529	55	21 824	8	(D)	9	(D)	9	(D)
Sarasota, FL MSA	20	2 496	52	10 145	182	90 831	17	4 459	9	4 835	24	5 455
Savannah, GA MSA	11	(D)	45	23 753	75	18 465	3	(D)	4	(D)	15	2 131
Scranton-Wilkes-Barre, PA MSA	17	1 342	63	17 070	244	80 911	7	1 607	23	9 250	42	4 737
Seattle-Tacoma, WA CMSA	83	11 568	448	166 760	977	522 210	84	(D)	79	56 430	164	28 835
Seattle, WA PMSA	71	10 205	369	137 904	823	447 420	83	86 713	63	44 970	128	22 377
Tacoma, WA PMSA	12	1 363	79	28 856	154	74 790	1	(D)	16	11 460	36	6 458
Sharon, PA MSA	2	(D)	12	2 441	51	7 391	-	-	4	(D)	9	(D)
Sheboygan, WI MSA	4	321	14	1 424	29	14 035	1	(D)	2	(D)	2	(D)
Sherman-Denison, TX MSA	5	(D)	14	7 437	34	13 500	1	(D)	3	(D)	5	1 282
Shreveport, LA MSA	12	865	55	21 146	104	54 178	1	(D)	8	3 098	23	3 500
Sioux City, IA-NE MSA	1	(D)	15	10 439	51	13 141	-	-	6	2 372	8	1 603
Sioux Falls, SD MSA	1	(D)	26	3 565	62	15 940	3	(D)	6	(D)	10	2 908
South Bend-Mishawaka, IN MSA	7	(D)	41	23 900	85	21 976	2	(D)	10	5 227	23	2 172
Spokane, WA MSA	7	(D)	67	22 580	140	56 217	3	(D)	12	(D)	23	3 743
Springfield, IL MSA	5	(D)	15	4 010	75	22 578	4	267	6	(D)	13	1 879
Springfield, MO MSA	11	1 703	68	41 507	197	58 513	8	5 682	9	8 753	43	7 757
Springfield, MA MSA	9	514	58	16 032	101	26 143	2	(D)	7	(D)	28	2 833
State College, PA MSA	2	(D)	11	3 558	44	7 051	3	950	7	(D)	3	(D)
Steubenville-Werton, OH-WV MSA	1	(D)	14	3 871	61	16 701	2	(D)	7	(D)	8	1 606
Stockton, CA MSA	11	(D)	61	22 844	136	42 387	5	5 209	12	6 972	40	6 545
Syracuse, NY MSA	11	2 010	77	26 470	224	46 538	2	(D)	26	5 968	24	4 546
Tallahassee, FL MSA	13	(D)	30	8 448	84	28 736	4	1 674	8	5 016	17	2 155
Tampa-St. Petersburg-Clearwater, FL MSA	70	6 312	370	116 143	744	411 890	32	29 057	54	29 925	141	20 645
Terre Haute, IN MSA	5	(D)	20	8 425	52	6 749	1	(D)	7	2 250	11	(D)
Texarkana, TX-AR MSA	4	(D)	16	1 732	31	5 855	2	(D)	2	(D)	5	1 105
Toledo, OH MSA	14	2 179	94	35 109	229	75 107	9	(D)	25	9 987	36	5 660
Topeka, KS MSA	7	1 242	26	4 726	66	12 494	2	(D)	8	(D)	5	(D)
Tucson, AZ MSA	30	(D)	101	29 944	221	99 704	12	(D)	17	13 080	59	10 043
Tulsa, OK MSA	14	(D)	111	86 278	239	106 333	16	5 403	23	12 493	41	5 335
Tuscaloosa, AL MSA	5	616	22	3 915	40	7 458	2	(D)	3	(D)	16	2 141
Tyler, TX MSA	3	140	23	8 255	51	11 545	2	(D)	6	(D)	10	2 528
Utica-Rome, NY MSA	12	1 799	40	19 533	126	28 458	2	(D)	8	2 803	14	(D)
Victoria, TX MSA	2	(D)	20	(D)	37	6 325	-	-	3	(D)	3	(D)
Visalia-Tulare-Porterville, CA MSA	4	(D)	51	13 426	75	19 059	2	(D)	5	2 280	24	3 348
Waco, TX MSA	9	519	37	17 488	75	21 019	5	(D)	3	(D)	17	1 977
Washington, DC-MD-VA MSA	137	24 800	432	137 059	1 435	851 959	236	144 146	115	86 783	252	100 387
Waterbury, CT MSA	3	291	28	9 088	88	22 264	4	(D)	5	(D)	26	3 740
Waterloo-Cedar Falls, IA MSA	6	493	27	4 405	65	17 586	1	(D)	7	2 955	6	(D)
Wausau, WI MSA	-	-	19	14 754	46	8 370	1	(D)	4	(D)	3	(D)
West Palm Beach-Boca Raton-Deer Beach, FL MSA	30	3 191	160	45 702	410	244 522	22	8 217	25	14 350	63	11 221
Wheeling, WV-OH MSA	5	431	14	9 893	60	24 862	3	(D)	7	(D)	8	428
Wichita, KS MSA	18	1 295	74	27 434	201	56 063	4	847	17	8 166	36	6 321
Wichita Falls, TX MSA	4	(D)	27	9 145	52	10 867	1	(D)	5	1 286	6	(D)
Williamsport, PA MSA	3	261	19	16 081	26	4 460	-	-	3	(D)	2	(D)
Wilmington, NC MSA	2	(D)	24	5 645	58	22 988	3	(D)	7	(D)	2	(D)
Worcester, MA MSA	10	(D)	59	19 170	141	42 923	5	(D)	7	(D)	40	4 361
Yakima, WA MSA	5	(D)	31	6 912	55	18 003	-	-	6	(D)	12	2 264
York, PA MSA	17	(D)	59	22 900	150	43 056	4	(D)	10	3 845	30	4 160
Youngstown-Warren, OH MSA	12	1 445	67	25 400	203	43 673	7	(D)	10	(D)	37	5 175
Yuba City, CA MSA	4	281	19	5 516	36	10 529	1	(D)	4	(D)	7	930

Table 1a. Summary Statistics for Firms Subject to Federal Income Tax for the United States: 1987—Con.

[Includes only establishments with payroll. For meaning of abbreviations and symbols, see introductory text. For explanation of terms and comparability of 1982 and 1987 censuses, including revised methodology for presenting establishment counts, see appendix A.]

1987 SIC code	Kind of business or operation	Establish- ments (number)	Receipts (\$1,000)	Annual payroll (\$1,000)	First quarter payroll (\$1,000)	Paid employees for pay period including March 12 (number)	Unincorporated businesses or operations	
							Individual proprietor- ships (number)	Partne- rships (number)
76	Miscellaneous repair services	65 532	20 837 874	6 415 757	1 488 089	345 836	27 175	3 311
762	Electrical repair shops	18 732	6 597 412	2 106 548	494 790	107 378	7 137	788
7622	Radio and television repair shops	6 523	1 623 186	530 464	129 040	32 091	2 958	319
7623 9	Other electrical and electronic repair shops	12 209	4 974 226	1 576 084	365 750	75 287	4 179	489
7623	Refrigeration and air-conditioning service and repair shops	3 565	1 521 144	464 171	104 269	20 512	1 234	95
7629	Electrical and electronic repair shops, n.e.c.	6 644	3 453 082	1 111 913	261 481	54 775	2 945	373
763	Watch, clock, and jewelry repair	1 661	231 122	68 718	16 283	5 259	757	67
764	Reupholstery and furniture repair	7 146	881 711	289 204	65 491	23 836	4 538	527
769	Miscellaneous repair shops and related services	37 993	13 127 629	3 951 287	911 525	209 363	14 743	1 929
7692	Welding repair	5 885	1 238 048	391 000	86 804	24 778	3 226	264
7694	Armature rewinding shops	2 830	1 943 971	595 741	140 209	27 255	719	131
7699	Repair shops and related services, n.e.c.	29 178	9 945 610	2 964 546	684 512	157 330	10 798	1 534
7699 pt	Farm machinery and equipment repair shops	1 339	266 236	66 325	14 935	4 298	757	97
7699 pt	Lawnmower and other small engine repair	2 472	427 805	98 870	21 481	7 260	1 291	182
7699 pt	Sewer and septic tank cleaning services	2 312	695 485	235 133	52 606	13 139	1 106	120
7699 pt	Other repair and related services, n.e.c.	23 055	8 536 084	2 564 218	595 490	132 633	7 644	1 135
78, 79, 84	Amusement and recreation services, including motion pictures and museums	99 480	57 637 581	16 473 599	3 804 291	1 094 396	22 794	8 427
781. 2	Motion picture production, distribution, and services	11 242	19 916 629	4 973 497	1 206 871	171 328	924	524
7812 pt	Motion picture production, except for television	3 086	3 353 351	819 849	199 076	25 371	323	160
7812 pt	Motion picture and tape production for television	3 132	4 682 391	1 459 170	368 573	37 986	228	148
7819	Services allied to motion picture production	3 668	4 556 783	1 996 774	469 381	87 955	256	141
7822 pt	Motion picture film exchanges	878	4 858 320	436 601	110 785	14 125	68	43
7822 pt	Film and tape distribution for television	262	2 359 380	223 141	52 454	4 812	25	22
7829	Services allied to motion picture distribution	186	106 404	37 962	6 602	1 079	24	10
783	Motion picture theaters	7 776	3 977 078	584 337	135 552	84 086	1 083	488
7832	Motion picture theaters, except drive-in	6 777	3 809 209	550 813	129 477	89 613	831	466
7833	Drive-in motion picture theaters	999	167 869	33 524	6 075	4 473	252	100
784	Video tape rental	16 824	2 687 138	580 785	137 301	79 559	6 082	2 617
792	Theatrical producers (except motion picture), bands, orchestras, and entertainers	7 847	4 904 224	1 606 614	423 855	55 226	1 693	464
7922	Theatrical producers (except motion picture) and miscellaneous theatrical services	3 253	2 543 391	744 802	191 465	31 534	499	271
7922 pt	Producers of live theatrical productions	940	809 222	201 536	46 216	11 199	138	136
7922 pt	Producers of radio and television shows, except tape	345	175 791	70 166	18 252	1 556	21	12
7922 pt	Artists' and entertainers' managers or agents, concert bureaus, booking agents	1 176	700 836	272 254	78 256	8 252	208	67
7922 pt	Other theatrical services	792	857 542	200 846	46 741	10 525	132	56
7929	Bands, orchestras, actors, and other entertainers and entertainment groups	4 594	2 360 833	661 812	232 390	23 692	1 194	183
7929 pt	Dance groups and artists	104	32 981	11 477	2 426	717	1 300	6
7929 pt	Symphony orchestras, opera companies, and chamber music organizations	56	26 474	9 639	2 798	989	17	1
7929 pt	Other music and entertainment presentations	4 434	2 301 378	840 695	227 166	21 986	1 147	186
7929 pt	Other music groups and artists	2 201	1 005 832	305 600	71 958	14 271	864	143
7929 pt	Other entertainers and entertainment groups	2 233	1 295 546	535 096	155 208	7 715	283	43
793	Bowling centers	6 671	2 539 562	702 308	184 194	99 780	1 192	536
79 ex 792, 3 84	Commercial sports and other amusement and recreation services, including museums	49 120	23 612 950	7 026 058	1 716 518	594 417	11 820	3 798
794	Commercial sports	3 184	5 023 194	2 047 153	605 840	75 523	1 032	217
7941	Professional sports clubs and promoters	807	1 904 388	1 354 231	458 009	26 566	70	89
7941 pt	Baseball clubs	139	501 236	436 152	82 649	6 192	-	14
7941 pt	Football clubs	31	306 573	487 539	235 045	3 330	-	8
7941 pt	Other professional sports clubs	133	516 311	300 290	104 770	7 696	1	38
7941 pt	Managers and promoters	504	580 268	130 250	35 545	9 348	69	29
7948	Racing, including track operation	2 377	3 118 806	692 922	148 831	48 957	962	128
7948 pt	Auto racetrack operation	436	320 793	47 789	10 786	3 833	57	20
7948 pt	Horse racetrack operation	136	1 781 239	386 417	78 654	24 792	5	8
7948 pt	Dog racetrack operation	55	462 373	101 702	23 937	9 004	2	1
7948 pt	Racing stables and racing, n.e.c.	1 750	554 401	157 014	35 454	11 328	902	99
79 ex 792, 3 4, 84	Other amusement and recreation services, including museums	45 936	18 589 756	4 978 905	1 109 678	518 894	10 786	3 581
791	Dance studios, schools, and halls	4 016	383 445	112 403	27 963	19 759	1 881	218
7991	Physical fitness facilities	9 376	2 570 682	744 584	181 347	104 917	2 014	855
7991 pt	Physical fitness centers, except gymnasiums and athletic clubs	8 363	2 142 500	610 427	148 842	55 759	1 897	745
7991 pt	Membership gymnasiums and athletic clubs	739	371 559	116 121	28 223	16 474	48	84
7991 pt	Nonmembership gymnasiums and athletic clubs	274	56 623	18 036	4 282	2 684	69	18
7992	Public golf courses	2 736	1 112 636	299 367	52 153	24 239	653	292
7993	Coin-operated amusement devices	4 450	1 396 312	296 688	67 988	24 924	867	354
7994	Amusement parks	744	3 469 836	819 552	148 713	60 413	92	53
7997	Membership sports and recreation clubs	7 659	3 699 831	1 172 705	245 656	112 724	1 078	653
7999 84	Amusement and recreation services, including museums, n.e.c.	16 955	5 957 014	1 533 606	385 828	171 917	4 203	1 156
7999 pt	Concession operators of amusement devices and rides	925	229 060	47 892	6 564	5 085	245	68
7999 pt	Carnivals, circuses, and fairs	515	313 342	49 118	9 017	4 780	124	33
7999 pt	Carnivals and circuses	351	266 952	39 648	7 347	3 572	113	29
7999 pt	Fairs	164	46 390	9 470	1 670	1 208	11	4
7999 pt	Billiard and pool establishments	781	96 517	21 485	5 327	3 130	356	91
7999 pt, 84	Other recreation and amusements, including museums	14 734	5 318 095	1 415 108	364 920	159 922	3 478	964
84	Museums, art galleries, and botanical and zoological gardens	328	123 360	34 346	7 246	2 799	99	28
8412	Museums and art galleries	238	76 725	20 616	4 192	1 776	71	24
8422	Arboreta and botanical or zoological gardens	90	46 635	13 730	3 054	1 021	28	4
7999 pt	Roller skating rinks	1 741	271 917	68 064	17 361	16 079	300	109
7999 pt	Ice skating rinks	193	69 968	16 637	4 546	2 567	30	7
7999 pt	Other amusement and recreation services, n.e.c.	12 472	4 852 830	1 295 897	335 767	137 477	3 049	820

Table 6. Summary Statistics for Firms Subject to Federal Income Tax for Places With 350 Establishments or More: 1987 - Con.

Includes only establishments with payroll. For meaning of abbreviations and symbols, see introductory text. For explanation of terms and comparability of 1982 and 1987 censuses, including methodology for presenting establishment counts, see appendix A. For information on geographic areas followed by A, see appendix F.

1987 SIC code	Geographic area and kind of business or operation	Establishments (number)	Receipts (\$1,000)	Annual payroll (\$1,000)	First quarter payroll (\$1,000)	Paid employees for pay period including March 12 (number)	Unincorporated businesses or operators	
							Individual proprietorships (number)	Partnerships (number)
PORTLAND A - Con.								
76	Automotive repair, services, and parking - Con.							
753	Automotive repair shops - Con.							
7530, 4, 6, 7, 9	Other automotive repair shops	60	19 241	5 318	1 323	295	11	5
7533	Automotive exhaust system repair shops	9	(D)	(D)	(D)	(D)	1	-
7534	Tire retreading and repair shops	6	(D)	(D)	(D)	(D)	1	-
7536	Automotive glass replacement shops	18	(D)	(D)	(D)	(D)	7	3
7537	Automotive transmission repair shops	19	(D)	(D)	(D)	(D)	3	2
7539	Automotive repair shops, n.e.c.	6	5 952	1 950	436	106	3	1
7539 PL	Radiator repair	6	1 025	378	97	27	2	1
7539 PL	Brake, front end, and wheel alignment	4	(D)	(D)	(D)	(D)	2	-
7539 PL	Automotive electrical and fuel system services	5	(D)	(D)	(D)	(D)	1	1
7539 PL	Other automotive repair shops, n.e.c.	4	(D)	(D)	(D)	(D)	1	-
754	Automotive services, except repair	54	(D)	(D)	(D)	(D)	13	3
7542	Carwashes	27	8 658	3 015	640	214	9	3
7546	Automotive services, except repair and carwashes	27	(D)	(D)	(D)	(D)	4	3
76	Miscellaneous repair services	184	79 715	24 746	5 764	1 249	56	12
762	Electrical repair shops	45	21 136	7 270	1 825	344	9	2
7622	Radio and television repair shops	14	5 425	2 404	587	125	2	2
7623, 9	Other electrical and electronic repair shops	31	15 711	4 866	1 236	218	7	2
7623	Refrigeration and air-conditioning service and repair shops	5	1 832	655	151	30	1	0
7629	Electrical and electronic repair shops, n.e.c.	28	13 879	4 211	1 087	189	6	2
763	Watch, clock, and jewelry repair	5	(D)	(D)	(D)	(D)	1	1
764	Reupholstery and furniture repair	24	(D)	(D)	(D)	(D)	14	2
769	Miscellaneous repair shops and related services	110	55 649	16 576	3 727	916	32	7
7692	Welding repair	12	(D)	(D)	(D)	(D)	1	1
7693	Armature reaming shops	92	(D)	(D)	(D)	(D)	31	6
7699	Repair shops and related services, n.e.c.	6	(D)	(D)	(D)	(D)	1	1
79	Amusement and recreation services, including motion pictures and museums	180	87 835	25 919	7 847	1 828	39	10
792	Motion picture production, distribution, and services	29	13 156	2 716	(D)	(D)	6	-
793	Motion picture theaters	29	9 919	1 388	345	311	-	-
7932	Motion picture theaters, except drive-in	22	(D)	(D)	(D)	(D)	-	-
7933	Drive-in motion picture theaters	1	(D)	(D)	(D)	(D)	-	-
794	Video tape rental	32	7 124	2 118	426	208	10	5
792	Theatrical producers (except motion picture), bands, orchestras, and entertainers	26	9 592	1 498	331	149	13	-
7922	Theatrical producers (except motion picture) and miscellaneous theatrical services	12	(D)	(D)	(D)	(D)	3	-
7929	Bands, orchestras, actors, and other entertainers and entertainment groups	14	(D)	(D)	(D)	(D)	10	-
793	Bowling centers	8	(D)	(D)	(D)	(D)	-	1
79 ex. 792, 3, 4, 84	Commercial sports and other amusement and recreation services, including museums	62	31 112	14 854	5 514	785	10	4
794	Professional sports clubs and promoters	5	37 596	(D)	(D)	(D)	-	-
7941	Racing, including track operation	3	(D)	(D)	(D)	(D)	-	-
7946	Other amusement and recreation services, including museums	54	16 742	(D)	(D)	(D)	10	4
79 ex. 792, 3, 4, 84	Dance studios, schools, and halls	5	(D)	(D)	(D)	(D)	3	2
7981	Physical fitness facilities	12	2 563	1 084	312	166	2	2
7982	Public golf courses	2	(D)	(D)	(D)	(D)	3	3
7983	Co-op-operated amusement devices	10	2 925	905	155	58	2	-
7986	Amusement parks	1	(D)	(D)	(D)	(D)	-	-
7987	Membership sports and recreation clubs	6	(D)	(D)	(D)	(D)	-	1
7989, 84	Amusement and recreation services, including museums, n.e.c.	18	6 480	1 420	151	104	3	1
7989 PL	Concession operators of amusement devices and rides	3	(D)	(D)	(D)	(D)	-	-
7989 PL	Carnivals, circuses, and fairs	-	(D)	(D)	(D)	(D)	-	-
7989 PL	Billiard and pool establishments	-	(D)	(D)	(D)	(D)	-	-
7989 PL, 84	Other recreation and amusements, including museums	15	(D)	(D)	(D)	(D)	3	1
80	Health services	1 090	407 856	184 084	45 367	7 802	474	70
801	Offices and clinics of doctors of medicine	502	219 241	106 220	27 458	2 671	148	43
801 PL	Offices of doctors of medicine	486	(D)	(D)	(D)	(D)	148	43
801 PL	Clinics of doctors of medicine	16	(D)	(D)	(D)	(D)	-	-
802	Offices and clinics of dentists	298	61 579	21 614	5 222	1 365	200	3
802 PL	Offices of dentists	294	58 443	20 080	4 830	1 300	199	3
802 PL	Clinics of dentists	4	2 136	1 534	392	65	1	-
8042	Offices and clinics of doctors of osteopathy	23	4 867	2 381	589	69	9	1
8043, 9	Offices and clinics of other health practitioners	184	25 256	7 834	1 899	503	95	12
8043, 9	Offices and clinics of chiropractors	69	10 923	2 819	632	187	52	4
8043, 9	Offices and clinics of optometrists	21	3 842	824	234	86	13	3
8043, 9	Offices and clinics of podiatrists and other health practitioners, n.e.c.	74	10 391	4 091	833	230	30	5
8043	Offices and clinics of podiatrists	17	1 622	398	106	32	11	1
8049	Offices and clinics of health practitioners, n.e.c.	57	8 769	3 893	727	188	19	4

APPENDIX B. JOB DESCRIPTIONS

FILM INDUSTRY JOB DESCRIPTIONS

PRODUCTION DEPARTMENT

Production Coordinator
Office Workers: Secretaries, Wordprocessors
Production Assistant

DIRECTION DEPARTMENT

Second Assistant Director
Second Second Assistant Director

CAMERA DEPARTMENT

First Assistant Camera Operator (follow-focus)
Second Assistant Camera Operator (loader)

GRIP DEPARTMENT

Key Grip
First Assistant Grip (Best Boy Grip)
Dolly/Crane/Boom Grip
Grip/Rigger

GAFFER DEPARTMENT

LIGHTING DEPARTMENT

Key Electrician (Gaffer)
First Assistant Electrician
Electrician/Operator/Rigger
Generator Operator
Lighting Director

COSTUME DEPARTMENT

Key Wardrobe
Assistant Wardrobe (Costumer)
Costume Designer

SPECIAL EFFECTS DEPARTMENT

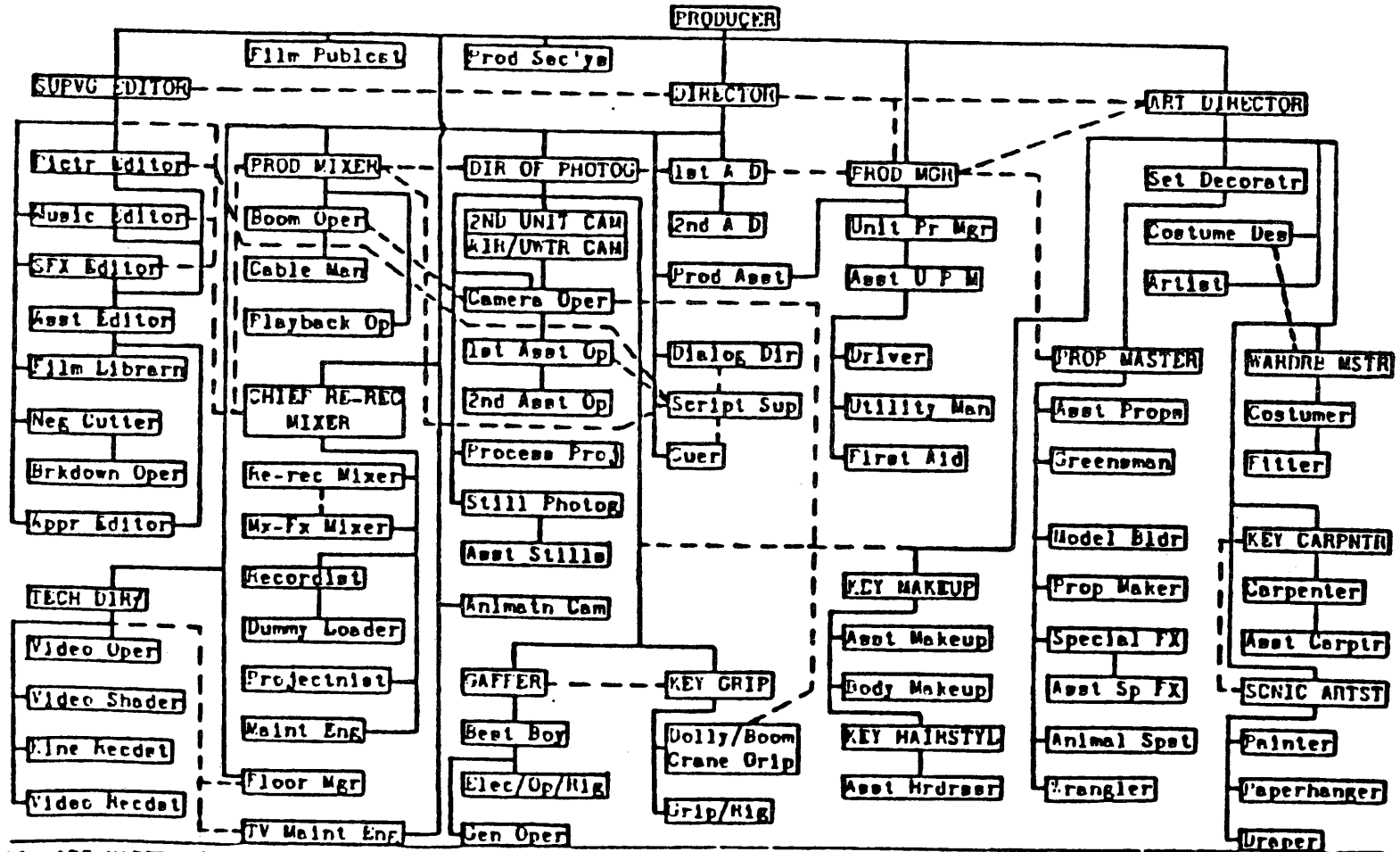
Set Decorator
Artist/Draftsperson
Greens Handler
Carpenter
Key Painter
Painter
Key Special Effects Technician
Assistant Special Effects Technician

STUNT DEPARTMENT
Stunt Person

FIRST AID DEPARTMENT
First Aid Technician

TRANSPORTATION DEPARTMENT
Driver Captain
Rig Driver
Driver
Mobile Studio Operator

THE MOTION PICTURE PRODUCTION TEAM*



*In AFC-NABET; Mixed Media. KEY: Category Heads in CAPS; — line of authority; --- line of communication.

APPENDIX C: RECENT FEATURE FILM AND VIDEO PRODUCTION

The record of film production over the last five years in the Portland region tells the story most effectively:

<u>Year</u>	<u>Name Of Film</u>	<u>Type</u>	
1985	* Male Noche	Feature Film	
	Last Innocent Man	Cable Movie	
1986	* Shadow Play	Feature Film	
1987	Permanent Record	Feature Film	
	* A Claymation Christmas Special	TV Special	
1988	Homer & Eddie	Feature Film	
	* Bad Trip	Video Movie	
	Breaking In	Feature Film	
	Drugstore Cowboy	Feature Film	
	* The Watcher	Video Movie	
	* Fatal Revenge	Video Movie	
	* Meet the Raisins	TV Special	
	Moonwalker	Music Video	
	1989	Love at Large	Feature Film
		The Haunting of Sarah Hardy	Cable Movie
Spy		Cable Movie	
Dangerous Pursuit		Cable Movie	
Come See the Paradise		Feature Film	
	* The California Raisin Show	TV Series	

The asterik indicates locally produced feature films, cable movies, or television series. This record of growth in film production does not account for the phenomenal growth in other forms of the film and video industry, such as the production of locally and nationally oriented commercials.

APPENDIX D. EXHIBITING FILM COMMISSIONS

The following page depicts the names of countries, states, provinces, counties and cities which took exhibit space at the Los Angeles Location EXPO 1990.

The list was taken from the Hollywood Reporter, dated February 22, 1990, p. S-4.

Exhibitor Breakdown

Listed below are the countries, states, provinces, counties and cities represented by exhibiting commissions at Location Expo 1990.

COUNTRIES

American Indian Registry
Australia
Bahamas
Canada
Cayman Islands
Israel
Jamaica
New Zealand
Great Britain
Poland
Thailand
U.S.A.
West Germany

STATES, PROVINCES AND TERRITORIES

Alabama
Alaska
Alberta
Arizona
Arkansas
British Columbia
California
Colorado
Connecticut
Delaware
Florida
Georgia
Hawaii
Hong Kong
Idaho
Illinois
Indiana
Iowa
Kansas
Louisiana
Manitoba
Maryland
Michigan
Minnesota
Mississippi
Missouri
Montana

Nebraska
Nevada
New Mexico
New South Wales
New York
North Carolina
Nova Scotia
Ohio
Oklahoma
Ontario
Oregon
Pennsylvania
Quebec
Queensland
Rhode Island
South Australia
South Carolina
South Dakota
Tennessee
Texas
Utah
Vermont
Virginia
Virgin Islands
Washington
Western Australia
Wisconsin
Wyoming
Yukon

CITIES AND COUNTIES

Albuquerque, NM
Amarillo, TX
Austin, TX
Big Bear, CA
Breckenridge, CO
Brevard County, FL
Boulder, CO
Broward County, FL
Butte, MT
Calgary, Alberta
Canon City, CO
Catalina, CA
Cedar Rapids, IA

Chicago, IL
Cody, WY
Colorado Springs, CO
Columbus, MS
Dallas/Ft. Worth, TX
Dubuque, IA
Durango, CO
Duval County, FL
Edmonton, Alberta
El Paso, TX
Eureka/Humboldt County, CA
Eureka Springs, AR
Flagstaff, AZ
Great Falls, MT
Greeley, CO
Gulf Coast Region, MS
Hillsboro County, FL
Houston, TX
Irving, TX
Kern County, CA
La Junta, CO
Lake Powell, AZ
Lake Tahoe, NV
Lawrence, KS
Lee County, FL
Lincoln, NE
London, ONT
Long Beach, CA
Los Angeles, CA
Los Angeles County, CA
Madera County, CA
Manatee County, FL
Manhattan, KS
Memphis/Shelby City, TN
Merced, CA
Meridian, MS
Metro/Dade County, FL
Miami, FL
Milwaukee, WI
Modesto, CA
Monroe, FL
Monterey County, CA
Montreal, QB

Montrose, CO
Munich, West Germany
Myrtle Beach, SC
Natchez, MS
Nevada County, CA
Oakland, CA
Ocala/Marion County, FL
Orlando, FL
Ottawa, ONT
Oxford, MS
Oxnard, CA
Page, AZ
Palm Beach County, FL
Philadelphia, PA
Phoenix, AZ
Pittsburgh, PA
Polk City, FL
Prince George's County, MD
Quad Cities, IA
Salina, KS
San Antonio, TX
San Diego, CA
San Francisco, CA
San Jose, CA
San Luis Valley, CO
Santa Barbara, CA
Santa Clara Pueblo, NM
Santa Cruz, CA
Sheridan, WY
Sonoma County, CA
Sonora County, CA
Stockton, CA
Thompson-Nicola, BC
Topeka, KS
Toronto, ONT
Trinidad, CO
Tuscon, AZ
Vicksburg, MS
Volusia County, FL
Washington, DC
Winnfield, LA
Yuma, AZ
Zia Pueblo, NM

APPENDIX E. SURVEY OF OTHER CITIES

CITY OF PORTLAND
SURVEY OF FILM OFFICES

CITY: Orlando

NAME: Maria Cioce, Administrative Assistant

DEPARTMENT/OFFICE: Motion Picture and Television Division/ Industrial
Development Commission of Mid-Florida

PHONE: (407) 422-7159

WAS OFFICE ESTABLISHED BY ORDINANCE: No, however right to issue permits
for the City of Orlando was established by ordinance.

NUMBER OF F.T.E'S: 2

BUDGET: Funded by the Industrial Development Commission, a non-profit
organization funded by City, corporate and individual contributions.

DOES OFFICE ISSUE PERMITS: Yes, issues permits for the City of Orlando
and a few other cities. Does not issue permits for the County. This
office originates the permit and walks them through the governmental
process, getting signatures from each department requiring a permit.
One blanket permit.

IS THERE A CHARGE FOR PERMITS?: No.

PHILOSOPHY UNDERLYING CHARGES FOR CITY SERVICES: Cost recovery and
control of activities. May required pre-payment for City services.
Will rent fire department equipment but not police department
equipment.

DOES A SPECIAL POLICE UNIT EXIST? No.

ARE SECURITY AND FIRE REQUIREMENTS MET WITH OFF-DUTY PERSONNEL? Yes.

INSURANCE REQUIREMENTS: \$1 million general liability, \$5 million for
special effects involving incendiary or explosive devices.

OTHER COMMENTS:

- o No charge for roads or sidewalk use unless they are
completely closed.
- o Charge for police varies by time of day, standard hourly rate
charged between the hours of 7 a.m. and 7 p.m. After 7 p.m.,
rate increases to time and a half. Payments are made
directly to police officers.

**CITY OF PORTLAND
SURVEY OF FILM OFFICES**

CITY: Las Vegas

NAME: Bob Hirsch

DEPARTMENT/OFFICE: Motion Picture Division of Economic Development

PHONE: (702) 486-7150

NUMBER OF F.T.E'S:

CITY OFFICE RESPONSIBLE FOR FILM FUNCTION:

DOES OFFICE ISSUE PERMITS: Yes, coordinates with City departments from which permits are required, will obtain the necessary sign-offs for all required permits.

IS THERE A CHARGE FOR PERMITS?: No, only if a rush order is required. The City requires all paperwork to be completed 3 working days before the beginning of a shoot. If the production company is running behind, they can hire one of the Film Office permit coordinators at a half-day rate of \$75 to rush the process.

PHILOSOPHY UNDERLYING CHARGE FOR CITY SERVICES: Cost recovery.

DOES A SPECIAL POLICE UNIT EXIST? No

ARE SECURITY AND FIRE REQUIREMENTS MET WITH OFF-DUTY PERSONNEL? Yes, 4 hour minimum, no overtime allowed, flat rate of \$32.50/hour..

INSURANCE REQUIREMENTS: \$1 million general liability and \$1 million auto with City named as an additional insured.

OTHER COMMENTS: Film office staff seperated into locations and permit employees. The permit people are independent contractors available for hire by production companies to assist in the permitting process and other production needs.

- o Allow City, police and fire equipment to be used if operated by City personnel.
- o Parks fee - \$250 per day per site minimum for filming, \$25 per day per site minimum for staging/meal site.

CITY OF PORTLAND
SURVEY OF FILM OFFICES

CITY: Minneapolis

NAME: Randy Adamsick

DEPARTMENT/OFFICE: Contractor to the City

PHONE: (612) 348-2947

WAS OFFICE ESTABLISHED BY ORDINANCE: No.

NUMBER OF F.T.E'S: 1

CITY OFFICE RESPONSIBLE FOR FILM FUNCTION: Operates as an independent contractor on a renewable 1 year contract.

DOES OFFICE ISSUE PERMITS: No.

IS THERE A CHARGE FOR PERMITS?: No.

PHILOSOPHY UNDERLYING CHARGE FOR CITY SERVICES: Cost recovery.

DOES A SPECIAL POLICE UNIT EXIST? No

ARE SECURITY AND FIRE REQUIREMENTS MET WITH OFF-DUTY PERSONNEL? Yes.

INSURANCE REQUIREMENTS: \$1 million general liability.

OTHER COMMENTS:

- o Each year must present economic data to the City Council justifying renewal of his contract. Works out of an office in City Hall.

**CITY OF PORTLAND
SURVEY OF FILM OFFICES**

CITY: Phoenix

NAME: Debbie Everson

DEPARTMENT/OFFICE: Phoenix Motion Picture/Commercial Coordinating
Office

PHONE: (602) 262-4850

WAS OFFICE ESTABLISHED BY ORDINANCE: Not directly, however an ordinance regulating motion picture production and requiring permits was passed in 1974.

NUMBER OF F.T.E'S: 2 staff, 1 secretary and 1 part-time assistant.

BUDGET: \$157,000

CITY OFFICE RESPONSIBLE FOR FILM FUNCTION: City Manager/Public
Information Office

DOES OFFICE ISSUE PERMITS: No, coordinates with City departments from which permits are required.

IS THERE A CHARGE FOR PERMITS?: Yes, \$50 charge entitles holder to film at city facilities, hire off-duty personnel and rent city equipment.

PHILOSOPHY UNDERLYING CHARGE FOR CITY SERVICES: Cost recovery.

DOES A SPECIAL POLICE UNIT EXIST? An Assistant Police Chief in charge of Special Operations is assigned to work as a liason with the Motion Picture Office and a Sergeant is designated for motion picture assistance. Additionally, the Fire Department has assigned a Fire Division Chief as the liason for motion picture requirements.

ARE SECURITY AND FIRE REQUIREMENTS MET WITH OFF-DUTY PERSONNEL? Yes, 4 hour minimum, \$16/hr for officers and \$18/hr for supervisors. Supervisors required when 3 or more officers are needed.

INSURANCE REQUIREMENTS: \$1 million minimum, \$1-\$5 million minimum for filming at the airport.

OTHER COMMENTS: Allow City, police and fire equipment to be used if operated by City personnel.

**CITY OF PORTLAND
SURVEY OF FILM OFFICES**

CITY: Seattle

NAME: Bernice Sharp (official City Coordinator is Germaine Covington)

DEPARTMENT/OFFICE: City Engineer's Office

PHONE: (206) 684-5350

WAS OFFICE ESTABLISHED BY ORDINANCE: No.

NUMBER OF F.T.E.'S: None.

CITY OFFICE RESPONSIBLE FOR FILM FUNCTION: City Engineer

DOES OFFICE ISSUE PERMITS: No, coordinates with City departments from which permits are required.

IS THERE A CHARGE FOR PERMITS?: Yes, \$42 street use fee per location with a \$500 refundable deposit.

PHILOSOPHY UNDERLYING CHARGE FOR CITY SERVICES: Cost recovery.

DOES A SPECIAL POLICE UNIT EXIST? No

ARE SECURITY AND FIRE REQUIREMENTS MET WITH OFF-DUTY PERSONNEL? Yes, paid directly by the production company, 4 hour minimum, \$16.50/hr for officers and \$19/hr for supervisors. Supervisors required when 5 or more officers are needed. After 8 hours, rate increases to time and a half.

INSURANCE REQUIREMENTS: \$1 million general liability and \$1 million auto with City named as an additional insured.

OTHER COMMENTS:

- o Allow City, police and fire equipment to be used if operated by City personnel.
- o Parks fee - \$250 per day per site minimum for filming, \$25 per day per site minimum for staging/meal site.

CITY OF PORTLAND
SURVEY OF FILM OFFICES

CITY: Vancouver, B.C.

NAME: Pat Frye

DEPARTMENT/OFFICE: Filming and Special Events Office

PHONE: (604) 873-7011

WAS OFFICE ESTABLISHED BY ORDINANCE: No.

NUMBER OF F.T.E'S: 2; 80% of time spent on filming, 20% on special events

CITY OFFICE RESPONSIBLE FOR FILM FUNCTION: Engineering

DOES OFFICE ISSUE PERMITS: No, but must approve on-street filming.

IS THERE A CHARGE FOR PERMITS?: No, but require an up-front deposit to cover estimated cost of City services. Account is debited as labor charges are incurred. Deductions are made for all City personnel including police and fire.

PHILOSOPHY UNDERLYING CHARGE FOR CITY SERVICES: Cost Recovery

DOES A SPECIAL POLICE UNIT EXIST?

ARE SECURITY AND FIRE REQUIREMENTS MET WITH OFF-DUTY PERSONNEL? Yes, all time is paid at overtime rates with a three hour minimum. An average rate is \$44.84/hour.

INSURANCE REQUIREMENTS: \$2 million general liability, naming the City as an additional insured and containing a cross-liability clause.

OTHER COMMENTS:

CITY OF PORTLAND
SURVEY OF FILM OFFICES

CITY: Toronto

NAME: Naish McHugh

DEPARTMENT/OFFICE: Toronto Film Office

PHONE: (416)392-7570

WAS OFFICE ESTABLISHED BY ORDINANCE: Yes; bylaws governing City streets, parks and property zoning were amended to allow location filming to occur throughout the City.

YEAR ESTABLISHED: Permit process established 10 years ago.

NUMBER OF F.T.E'S: 5

BUDGET: Funded out of the General Fund

CITY OFFICE RESPONSIBLE FOR FILM FUNCTION: City Hall

DOES OFFICE ISSUE PERMITS: Yes, one-stop permitting. Issue approx. 3,000 permits per year for over 3,000 City locations.

IS THERE A CHARGE FOR PERMITS?: No.

PHILOSOPHY UNDERLYING CHARGE FOR CITY SERVICES:

COST RECOVERY: Yes. Only charge out-of-pocket expenses. No fee for use of City owned buildings or equipment, but do charge for City employee's used for security/ equipment operation/ electrical needs.

DOES A SPECIAL POLICE UNIT EXIST? No

ARE SECURITY AND FIRE REQUIREMENTS MET WITH OFF-DUTY PERSONNEL? Yes, pay based on normal, straight wages; cannot work more than 8 hours so there is no overtime.

INSURANCE REQUIREMENTS: \$2 million general comprehensive, City must be named as additional insured, policy must contain a cross-liability clause.

OTHER COMMENTS: Regional parks department charges \$25 minimum for permit to use regional parks located within the City of Toronto.

CITY OF PORTLAND
SURVEY OF FILM OFFICES

CITY: Los Angeles

NAME: Mei Ong, Assistant Director

DEPARTMENT/OFFICE: Motion Picture/Television Coordinating Office

PHONE: (213) 485-5324

WAS OFFICE ESTABLISHED BY ORDINANCE: Yes

YEAR ESTABLISHED: 1973

NUMBER OF F.T.E'S: 9

BUDGET: \$500,000

CITY OFFICE RESPONSIBLE FOR FILM FUNCTION: Board of Public Works

DOES OFFICE ISSUE PERMITS: Yes, almost one-stop permitting except for Special Effects which are require a seperate permit that is issued by the L.A. Fire Department.

IS THERE A CHARGE FOR PERMITS?: Yes, \$115 application fee plus \$25 for any changes/amendments.

PHILOSOPHY UNDERLYING CHARGES: Cost recovery plus profit/use charge.

DOES A SPECIAL POLICE UNIT EXIST?

ARE SECURITY AND FIRE REQUIREMENTS MET WITH OFF-DUTY PERSONNEL? Yes.

INSURANCE REQUIREMENTS: Minimum \$1 million general liability up to \$3 million if aircraft are involved.

OTHER COMMENTS:

- o Business Tax Registration Certificate required for all firms doing business in Los Angeles.
- o Los Angeles Film Development Committee, consisting of 50 members appointed by the Mayor, works to improve relations between the City and the industry and to encourage growth and development of the industry.

CITY OF PORTLAND
SURVEY OF FILM OFFICES

CITY: LOS ANGELES COUNTY

NAME: Pat Nativo

DEPARTMENT/OFFICE:

PHONE: (213) 738-3456

WAS OFFICE ESTABLISHED BY ORDINANCE:

NUMBER OF F.T.E'S: 3, Office head responsible for Film and Cable T.V.,
2 full time clerks.

BUDGET: None ear-marked for Film alone.

STAND-ALONE DEPARTMENT? No

COUNTY OFFICE RESPONSIBLE FOR FILM FUNCTION: Facilities Management
Department (has 5,000 employees)

DOES OFFICE ISSUE PERMITS: One-stop permitting for county property and
buildings and permits for unincorporated areas in the county.

IS THERE A CHARGE FOR PERMITS?: Yes, \$110 for permit plus \$25 for
review by fire department.

PHILOSOPHY UNDERLYING PERMIT CHARGE: Cost recovery, but fee is not high
enough to cover all costs, should be charging around \$170.

CHARGES FOR COUNTY SERVICES: Several

DOES A SPECIAL POLICE UNIT EXIST? No

ARE SECURITY AND FIRE REQUIREMENTS MET WITH OFF-DUTY PERSONNEL? Not
sure about police, fire safety officer requirements are met by retired
firemen who have been certified by the Fire Department.

INSURANCE REQUIREMENTS: \$1 million general liability, \$1 million auto,
evidence of workers compensation, \$2 million of aviation liability if
aircrafts are involved.

OTHER COMMENTS: Waive charges for students and non-profit corporations.

CITY OF PORTLAND
SURVEY OF FILM OFFICES

CITY: New Orleans

NAME: Kimberly Carbo

DEPARTMENT/OFFICE: Mayor's Office/Public Information

PHONE: (504) 586-4322

WAS OFFICE ESTABLISHED BY ORDINANCE: No, but a Film Commission has recently been established by Ordinance with the purpose of promoting the City. In addition to the liason role performed by the Mayor's Office, the City has a formal Film Committee comprised of representatives from the following departments:

- o Mayor's Press Secretary and Director of Public Information
- o Regional Transit Authority
- o Department of Streets/Traffic Engineering
- o Police
- o Fire
- o Sanitation
- o French Quarter (Vieux Carre)
- o Parkway and Park Commission

Associate Members:

- o Audubon Park and Zoological Garden
- o French Market Corporation
- o Tourist and Convention Commission
- o Sheriff's Office
- o City Park Improvement Association
- o New Orleans Museum of Art

NUMBER OF F.T.E'S: None formally dedicated full-time.

CITY OFFICE RESPONSIBLE FOR FILM FUNCTION: Mayor's

DOES OFFICE ISSUE PERMITS: No, functions as the key contact point between the production company, the State Film Office and the City departments. There is not one blanket permit.

IS THERE A CHARGE FOR PERMITS?: No, but there is a charge for City services.

PHILOSOPHY UNDERLYING CITY CHARGES: Cost Recovery, extensive fee schedules.

DOES A SPECIAL POLICE UNIT EXIST? No.

ARE SECURITY AND FIRE REQUIREMENTS MET WITH OFF-DUTY PERSONNEL? Yes, four hour minimum with an average hourly rate of \$15.

INSURANCE REQUIREMENTS: \$1 million proof of insurance with City named as co-insured or additional insured.

OTHER COMMENTS: The recently formed Film Commission will consist of 9 people, 2 of which will be appointed by the Mayor with each Council member filling one of the remaining 7 positions. The Commission receives no City funds.

APPENDIX F. SAMPLE LOCATION AGREEMENTS

LOCATION AGREEMENT

This location agreement is between City of Portland, Oregon (City) and _____ (Production Company),

AGREED:

1. This location agreement shall be effective as of _____ and shall terminate as of _____. Preparation, filming and removal of all production company equipment shall occur between the effective and termination dates.
2. City agrees to permit production company to enter into City's property described as _____ for the purpose of production company's production of a _____.
3. City agrees to permit production company to film and photograph the property described in section 2 hereof for the production described in section 2 hereof and to use the films, photographs and accompanying sound tracks taken at the property in whatever way production company may deem necessary or desirable. City shall have no right or interest whatever in any such films, photographs or sound tracks.
4. City agrees to permit production company to place all necessary facilities and equipment, including temporary sets, on the property. Production company shall remove the same after completion of work and leave the property in as good a condition as when received, reasonable wear and tear from the uses permitted herein excepted. Any alterations or damage to City property or facilities shall be restored or repaired by production company within 30 days of completion of filming. Any restoration or repair not completed within 30 days will be accomplished by City and the costs thereof will be charged to production company.
5. Prior to the effective date of this location agreement, production company shall deposit the sum of \$ _____ with City as a damage and cleaning deposit. This deposit will be returned in full if the property is returned in as good a condition as when received, reasonable wear and tear from the uses permitted herein excepted. If City is required to restore or repair pursuant to section 4 hereof the City may deduct charges for repair or restoration from this deposit.
6. Production company agrees to use reasonable care to prevent damage to the property. Production company shall be responsible for any loss or liability which City may suffer as a result of personal injury or property damage arising

from production company's activities under this location agreement. Production company shall hold harmless, defend and indemnify City, its officers, agents and employees against all claims, demands, actions and suits brought against any of them arising from production company's activities under this location agreement.

7. Production company shall maintain public liability and property damage insurance that protects production company, its subcontractors, and the City and its officers, agents, and employees from any and all claims, demands, actions, and suits for damage to property or personal injury, including death, arising from the production company's activities under this location agreement. The insurance shall provide coverage for not less than \$200,000 for personal injury to each person, \$500,000 for each occurrence, and \$500,000 for each occurrence involving property damages; or a single limit policy of not less than \$500,000 covering all claims per occurrence. The limits of the insurance shall be subject to statutory changes as to maximum limits of liability imposed on municipalities of the State of Oregon during the term of the agreement. The insurance shall be without prejudice to coverage otherwise existing and shall name as additional insureds the City and its officers, agents, and employees. Notwithstanding the naming of additional insureds, the insurance shall protect each insured in the same manner as though a separate policy had been issued to each, but nothing herein shall operate to increase the insurer's liability as set forth elsewhere in the policy beyond the amount or amounts for which the insurer would have been liable if only one person or interest had been named as insured. The coverage must apply as to claims between insureds on the policy. The insurance shall provide that the insurance shall not terminate or be cancelled without thirty (30) days written notice first being given to the City Auditor. If the insurance is cancelled or terminated prior to completion of the location agreement, production company shall provide a new policy with the same terms. Production company agrees to maintain continuous, uninterrupted coverage for the duration of the location agreement. The insurance shall include coverage for any damages or injuries arising out of the use of automobiles or other motor vehicles by production company.

Production company shall maintain on file with the City Auditor a certificate of insurance certifying the coverage required by this section. The adequacy of the insurance shall be subject to the approval of the City Attorney. Failure to maintain liability insurance shall be cause for immediate termination of this location agreement by the City.

8. Unless exempt, production company shall obtain workers' compensation insurance coverage for all of its workers, employees and subcontractors either as a carrier-insured employer or a self-insured employer, as provided by Chapter 656 of the Oregon Revised Statutes, before this location agreement is executed. A certification of insurance, or copy thereof, shall be attached to this location agreement as Exhibit__, if applicable, and shall be incorporated herein and made a term and part of this location agreement. Production company further agrees to maintain workers' compensation insurance coverage for the duration of this location agreement.

In the event production company's workers' compensation insurance coverage is due to expire during the term of this location agreement, production company agrees to timely renew its insurance, either as a carrier-insured employer or a self-insured employer as provided by Chapter 656 of the Oregon Revised Statutes, before its expiration, and production company agrees to provide the City of Portland such further certification of workers' compensation insurance as renewals of said insurance occur.

9. Production company agrees to pay City and City shall accept, in full payment for all rights granted hereunder, compensation as follows: _____ . In the event production company must return to shoot any additional scenes or pick up shots, production company shall pay City the same rate as above prorated per diem as \$_____ .
10. Production company agrees not to use the property in any offensive manner. _____ shall be the sole arbitrator of whether any such usage is offensive. Use of intoxicants on the property is prohibited. Any necessary supervision of, or interaction with the public by production company or its employees or contractors shall be conducted in a courteous and considerate manner.
11. Production company agrees to abide by any City rules and regulations which may govern the use of the property.
12. In the event of breach of this location agreement by production company, City shall notify production company in writing of the breach and allow 24 hours for production company to cure the breach. If the breach is not cured within 24 hours this location agreement shall terminate. In the event of such termination production company relinquishes all right to return of any compensation paid hereunder, including the security deposit specified in section 5 hereof.

13. Additional provisions:

Dated this _____ day of _____, 198__.

Production Company

City of Portland, OR

By _____

By _____

Title _____

Title _____

Approved as to form

Deputy City Attorney

rp
nea\contract\locagree

AN AGREEMENT FOR
POLICE ESCORTS FOR VIDEO TAPING OF A
MOBILE SCENE

This agreement is between the City of Portland, Bureau of Police (City) and [REDACTED] (Company).

RECITALS:

1. The Company is a television commercial production company taping a Jeep commercial in the Portland Metropolitan Area during the month of July, 1989.
2. The Company has need for three police officers and three marked patrol cars to serve as escorts on the I-405 and I-5 freeways during video taping that will occur while camera equipped vehicles are moving.
3. The City can provide three officers and three patrol cars to perform the escort service.
4. The Company will contract with the City for the escort service in accordance with the terms and conditions provided below.

AGREEMENT:

1. The City:
 - a. Shall provide to the Company three police officers and three police patrol cars for escort service on the I-405 and I-5 freeways on Sunday, July 16, 1989.
2. The Company:
 - a. Shall use the escort services provided by the officers for the exclusive purpose of taping the above referenced television commercial.
 - b. Shall reimburse the City for the salaries of the escort officers at the appropriate overtime rate plus any overhead rate required by the Code of the City of Portland. The total rate shall not exceed \$30.00 per hour per officer.

- c) Shall hold harmless, defend, and indemnify the City and the City's officers, agents, and employees against all claims, demands, actions, and suits (including all attorney fees and costs) brought against any of them arising from or incident to the taping of the mobile scene.
- d) Shall waive any claim against the City for damages to persons or property arising from or incident to the taping of the mobile scene.
- e) Shall maintain public liability and property damage insurance that protects the Company and the City and its officers, agents, and employees from any and all claims, demands, actions, and suits for damage to property or personal injury, including death, arising from or incident to the taping of the mobile scene. The insurance shall provide coverage for not less than \$100,000 for personal injury to each person, \$500,000 for each occurrence, and \$500,000 for each occurrence involving property damages or a single limit policy of not less than \$500,000 covering all claims per occurrence. The limits of the insurance shall be subject to statutory changes as to maximum limits of liability imposed on municipalities of the State of Oregon during the term of the Agreement. The insurance shall be without prejudice to coverage otherwise existing and shall name as additional insureds the City and its officers, agents, and employees. Notwithstanding the naming of additional insureds, the insurance shall protect each insured in the same manner as though a separate policy had been issued to each, but nothing herein shall operate to increase the insurer's liability as set forth elsewhere in the policy beyond the amount or amounts for which the insurer would have been liable if only one person or interest has been named as insured. The coverage must apply as to claims between insureds on the policy. The insurance shall provide that the insurance shall not terminate or be cancelled without thirty (30) days written notice first being given to the City's representatives. If the insurance is cancelled or terminated prior to completion of the Agreement, the Company agrees to maintain continuous, uninterrupted coverage for the duration of the Agreement and shall maintain on file with the City of Portland, Bureau of Police a certificate of insurance certifying the coverage required under subsection (g). The adequacy of the insurance shall be subject to the approval of the City Attorney. Failure to maintain liability insurance shall be cause for immediate termination of this Agreement by the City.
- f) Shall reimburse the City for either actual repair costs or the replacement value of a City owned, Police patrol vehicle, whichever is

less, in the event damage or total loss of a City owned vehicle occurs during or incident to the taping of the mobile scene.

- g) Shall not assign this Agreement, in whole or in part, or any right or obligation hereunder.

3. Breach of Agreement

- a) The Company shall breach this Agreement if it fails to perform any substantial obligation under the Agreement, except as provided in subsection (b).
- b) Neither the Company nor the City shall have breached this Agreement by reason of any failure to perform a substantial obligation under the Agreement if the failure arises out of causes beyond its control and without its fault or negligence.

4. Arbitration

- a) Any dispute under this Agreement which is not settled by mutual agreement of the Company and the City within sixty (60) days of notification in writing by either party shall be submitted to an arbitration panel. The panel shall be composed of three (3) persons, one of whom shall be appointed by the Company, one of whom shall be appointed by the City, and one of whom shall be appointed by the two arbitrators appointed by the Company and the City. In the event the two cannot agree on the third arbitrator, then the third shall be appointed by the Presiding Judge (Civil) of the Circuit Court of the State of Oregon for the County of Multnomah. The arbitrators shall be selected within thirty (30) days of the expiration of the sixty (60) days period. The arbitration shall be conducted in Portland, Oregon, shall be governed by the laws of the State of Oregon, and shall be as speedy as is reasonably possible. The Company and the City shall agree on the rules governing the arbitration, (including appropriation of costs), or, if the Company and the City cannot agree on rules, the arbitrators shall adopt rules consistent with this section. The arbitrators shall render their decision within forty-five (45) days of their first meeting with the Company and the City. Insofar as the Company and the City legally may do so, they agree to be bound by the decision of the panel.

5. Notice

- a) Any notice provided for under this Agreement shall be sufficient if in writing and delivered personally to the following addressee or deposited in the United States Mail, postage prepaid, certified mail, return receipt requested, addressed as follows, or to such other address as the receiving party hereafter shall specify in writing:

If to the City:

Charles F. Makinney
Portland Police Bureau
Director of Management Services
1111 SW 2nd Avenue, Room 1202
Portland, OR 97204

If to the Company:

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

6. Amendments

The City and the Company may amend this Agreement at any time only by written amendment executed by the City and the Company. The City's representative may agree to, and execute, any amendment on behalf of the City.

7. Integration

This Agreement contains the entire agreement between the City and the Company and supersedes all prior written or oral discussions or agreements.

8. Non-Waiver

The City and the Company shall not be deemed to have waived any breach of this Agreement by the other party, except by an express waiver in writing. An express written waiver as to one breach shall not be deemed a waiver of any other breach not expressly identified, even though the other breach be of the same nature as that waived.

COMPANY: _____

By: _____

Title: _____

Date: _____

APPROVED AS TO FORM:

CITY OF PORTLAND

City Attorney

By: _____

Name: Richard D. Walker

Date: _____

Title: Chief of Police

Date: _____