



# Revenue Bureau Special Events Program: Policy Update & Proposed Program Changes

- Information Packet:
  - Internal and External Stakeholders
  - **Meeting Date: October 12, 2009**
  - **Time: 1pm-4pm**
  - **Place: Revenue Bureau, Rivers Conference Room**
  - *Refreshments provided*



# Meeting Purpose & Outcomes

- The purpose of the meeting will be to...
  - Provide a special events policy update
    - Project goals
    - Stakeholder concerns
    - Addressing stakeholder concerns
  - Begin a review of the proposed program changes
- Expected outcomes
  - Check-in with stakeholders and city bureaus
  - Review proposed program expectations, including: program framework, definitions, costs/fees, and application processes and timelines



# Policy Process

- June-December 2008: stakeholder meetings, surveys, and interviews with comparable municipalities
- January 2009: Special Events Program Review Report completed
- City Council presentation on February 11, 2009: granted approval to proceed with four special events policy recommendations:
  - Routing recommendations for event organizers
  - An “a la carte menu” of city services and costs
  - Separate “free speech” permit
  - Provisions for “events with multiple activities”
- February –mid-June 2009: Continuing research and cost analysis
- Mid-June – present: Creation of routing maps and policy proposals with internal stakeholders



# Project goal:

To strike a balance between cost recovery and city service subsidies for moving events on city streets.

## Broad stakeholder concerns:

- Program needs to increase collaboration and education in:
  - Event modifications
  - Routing
  - Equity
  - Costs and Fees
- Restructure categories to address actual event complexity
- Incremental implementation of fees and cost recovery



# Addressing Stakeholder Needs By...

- Incorporating city capacity to provide services and specific event criteria for moving events on city streets
- Increasing equity
  - Eliminating limiting policies such as the two large athletic events per month provision
  - Creating a rolling application process
- Using event history to create street-level maps that show the cost impact to assist event organizers with routing decisions
- Align zone maps with services to enhance event organizer knowledge and creativity
- Develop criteria for free speech and events with multiple activities



# Key Questions

1. Does the program overview presented here achieve the project goals and areas of need identified by stakeholders?
2. What is missing that would further the goals?
3. What concerns do you have about the proposed program?
4. How would you summarize changes to the proposed program?



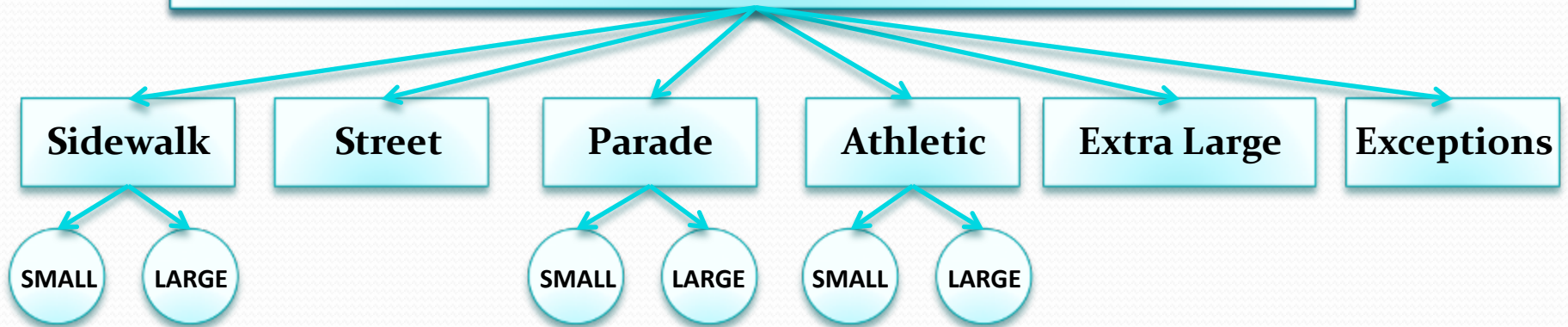
# Program Overview

Current Special Events Program

# Special Events Program: Current Framework

Street and sidewalk use: a grant of permission issued by the city to use streets and sidewalks for an event

## Nine Permit Categories & Subcategories:



- Categorization based on: event type (i.e., parade or athletic), event location, number of participants, use of motor vehicles and/or animals, use of city resources, and risk assessment.
- Nine categories
- Flat fees based on category



# Current Program Criteria & Fees

Event Type	Criteria	Fee	Insurance & Indemnity Required
Small Sidewalk	Less than 200 people; held on sidewalk; obey all traffic regulations; no city support required	None	No
Large Sidewalk	At least 200 people; held on sidewalk; obey all traffic regulations; minimal city support required	None	No
Street	At least 75 people; held in street; police and maintenance support, if needed, due to interference with regular vehicle traffic <b>PEDESTRIAN ONLY</b>	None	No
Small Parade	At least 75 people and the combination of people, vehicles and/or animals is less than 10 blocks in length and the route is generally less than one mile long; held in street; limited animals or vehicles allowed; police and maintenance support including mapping and traffic control devices may be needed due to interference with regular vehicle traffic	\$85.00	Yes
Large Parade	At least 75 people and the combination of people, vehicles and/or animals is greater than 10 blocks in length; held in street; animals or vehicles allowed; police and maintenance support including mapping and traffic control devices may be needed due to interference with vehicular traffic	\$690.00	Yes
Small Athletic	At least 200 people; held in the street; sponsor supplies security, traffic and maintenance support <b>COMPETITIVE AND NON COMPETITIVE EVENTS</b>	\$85.00	Yes
Large Athletic	At least 750 people; held in street; substantial police and maintenance support due to interference with traffic, number of people, and length (Maximum of 2 per month)	\$1,380.00	Yes
Extra Large	Requires more than 120 hours of city time; at least 750 people; spectators and/or long route; animals or vehicles allowed; substantial police and maintenance support because of interference with vehicular traffic, large number of people and length	\$2,760.00	Yes
Exceptions	If proposed street and sidewalk use does not fall into other categories	TBD	Probably



## Stakeholder Challenges\*: Current Program

- Categories and criteria are confusing: do not capture event complexity, events don't fit categories exactly
- Need to increase collaboration during event planning and permitting, including reducing costs (to organizers and the City), but difficult to understand costs in current structure
- Lack of equity among categories (*some* events are limited each month, *some* events pay full cost recovery...)
- Fees are not current – increased costs for city bureaus have eroded the benefit of flat fees
- Current policy does not meet the needs of internal or external stakeholders

**\*Stakeholder challenges identified by internal and external stakeholders in surveys and during meetings.**



# Program Overview

Proposed Special Events Program



# Addressing Stakeholder Concerns

## Stakeholder Challenge

- Confusing categories, vague criteria
- Inequitable policies among categories
- Lack of coordination and collaboration in planning, reducing costs
- Obsolete fees that do not always align with services required for events
- Policies do not meet stakeholder needs

## Proposed Program

- Fewer, broader categories, clearer program guidelines
- Policies updated to level the playing field
- Increased coordination and accountability for City bureaus and event organizers
- Fees provide relief for City bureaus and opportunities for organizers to cut costs
- Proposed policies based on stakeholder feedback



# New Responsibilities & Expectations

## Event Organizers

- Earlier application submissions for annual events
- Rolling application process for new events
- Final permit contingent upon final payment, monitoring plan, and other details required by the Special Events Coordinator

## City Bureaus

- Quicker response time on applications
- Provide event organizers with:
  - Cost estimates
  - Options for cost reduction
  - Clear guidance on routing
  - Clearer guidelines for street and sidewalk use within the program



# Addressing the Challenges: Proposed Framework

Moving event on city streets and/or sidewalks (summary): Authorized use of public streets and/or sidewalks for less than 10 hours; free for the public to watch. Events include parades, athletic events, walks and demonstrations.

**Additional criteria for permits, including routing, services, and guidelines.**



- Simplified categories and deepened criteria for moving events on city streets and sidewalks, including the capacity to provide city support services
- Aimed at increasing clarity and reducing confusion – if an event doesn't meet criteria, the event may need a permit from another program (i.e., parks, PBOT)



# Sample Criteria: Street & Sidewalk Use

- All events require an application and application review
- In general, non-free speech events will not be permitted from 6:30-9:30 am or 4-7 pm, Monday-Friday
- Events cannot break the law or City code
- Events cannot pose a public health or safety risk
- Events cannot exceed the City's capacity to provide services
- Events cannot be proximate to other Special Events Program permitted events
- Events cannot interfere with construction, maintenance, or scheduled bridge repair
- Street events downtown must have at least 200 participants



# Considering the City's Limited Resources: Capacity to Provide Services During Events

*Cumulative amount of City services for any given time period cannot exceed City capacity. Limiting factors include:*

- Event proximate to another Special Events Program permitted event
- Inference with abutting properties, or traffic & transit congestion
- Transit disruptions
- Public health or safety issues
- Exceeding affected bureau's budget (Reg/OT), available personnel, or resources
- Late application submittal
- Bridge repair
- Construction and/or maintenance
- Campaign visits





# Routing

- Current policy: to encourage lower impact routing choices – no formal routing or cost policy exists
- Standardized routes decrease creativity and create standardized impacts
- Policy solution: develop educational maps of low-, medium-, and high-impact roads within particular areas of town (zones) based on:
  - Traffic counts
  - Safety (including services required to ensure safety), and
  - Data from previous events regarding costs for city services
- Maps correspond to a menu of services



# Routing & Services

- Creation of city zones and maps to address how location affects cost
  - Low impact/best possible option: streets that provide the best rerouting and safety options for participants and citizens within a particular area of town
  - Medium impact: may require substantial public resources due to proximity to high-impact areas, or create residential disruption and rerouting challenges
  - High impact: requires substantial public resources to ensure safety
  - Streets that can be crossed but not used: i.e., bus malls, transit center areas
  - Streets that cannot be crossed or used: i.e., convergence of railroad, MAX, greyhound, and buses downtown (NW Glisan between 6<sup>th</sup> & Steel Bridge)
- Zones include: Downtown, North, Inner: SW, NW, SE, NE
- Routing maps are connected to the A La Carte Menu of services: different routes require different services
- City bureaus provide guidance on costs and cost reduction options
- Event organizers make choices according to budget and event needs

# Sample Routing Map: Downtown Portland

**"Downtown Zone"**

**Zone Rating: High Impact**

(Multiple challenges to reducing costs to city and event organizers)

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- Street closures may require up to 8 barricades per intersection to ensure public safety and traffic control
- Major intersections and/or transit intersections may require up to 4 police officers, plus transit supervisors
- Parking removal and courtesy towing may also be needed downtown
- Please see "a la carte menu" for complete fee information

<b>KEY</b>	<span style="color: green;">—</span> Low-impact or "best possible option" streets	<span style="color: purple;">○</span> High-impact intersection
	<span style="color: yellow;">—</span> Medium-impact streets	<span style="color: orange;">- - -</span> Zone boundaries
	<span style="color: orange;">—</span> High-impact streets	<span style="color: blue;">—</span> Street, area, bridge requires permitting from other agency
	<span style="color: red;">—</span> Streets that may be crossed but not used	
	<span style="color: black;">—</span> Streets that cannot be crossed or used	
	<span style="color: red;">—</span> and <span style="color: orange;">—</span> streets are high traffic and/or transit intersections. <span style="color: yellow;">—</span> streets incur increased costs because of traffic counts and proximity to high traffic and/or high transit streets.	

**Disclaimer and Conditions:** This is a general guideline regarding the level of services required within a particular area. This map is intended to estimate costs and assist with route planning. This map does not replace the expertise or decisionmaking authority of the Revenue Bureau's Special Events Program and Special Events Advisory Committee.



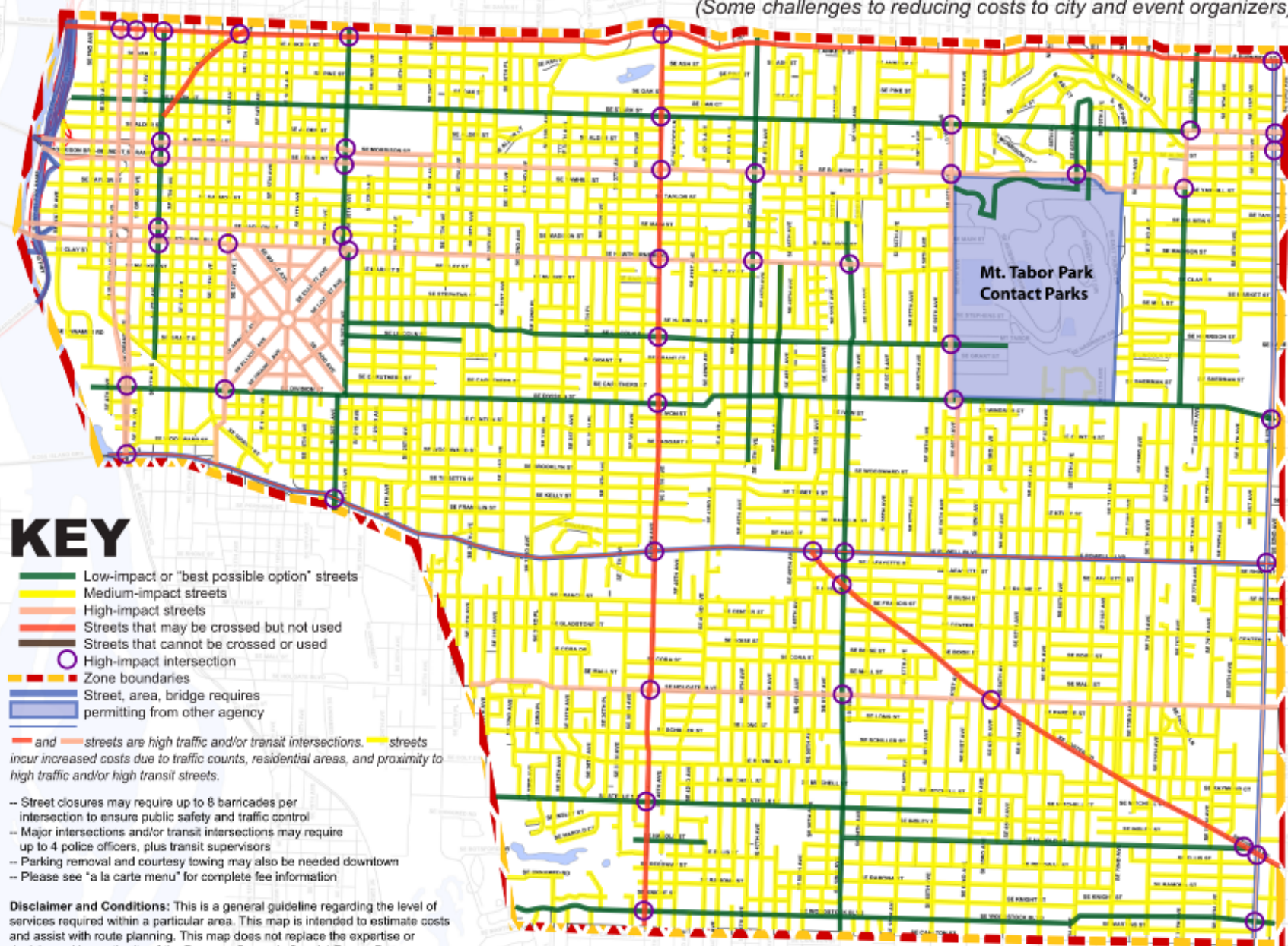
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## Sample Routing Map: SE Portland

**"Inner Southeast Zone"**

**Zone Rating: Medium/Low Impact**

(Some challenges to reducing costs to city and event organizers)



# Sample A La Carte Menu

- After selection of route, event organizers are provided with an invoice of costs, and opportunities for cost reduction
- Requires prompt and consistent cost estimates to event organizers
- Event organizers have the option to modify their event to save money
- Different menu items apply to different types of events – **not** one size fits all – depends on event type and services required

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## City of Portland Special Events Fee Schedule

Special Event Permittee:		Special Event Permit #:	
Event Name:		Event Date & Time:	

**Police:**  
Based on the number of officers and number of hours, 4-hour minimum.

<b>Officers</b>	Hourly Rate	4-Hr Min	Add'l Hrs	# Officers	=	\$0.00
	\$63.59	4				
Rationale for Officer usage:						
<b>Sergeants</b>	Hourly Rate	4-Hr Min	Add'l Hrs	# Officers	=	\$0.00
	\$73.02	4				
Rationale for Sergeant usage:						
<b>Motorcycle Officers</b>	Hourly Rate	4-Hr Min	Add'l Hrs	# Officers	=	\$0.00
	\$87.40	4				
Rationale for Motorcycle Officer usage:						
<b>Motorcycle Sergeant Officers</b>	Hourly Rate	4-Hr Min	Add'l Hrs	# Officers	=	\$0.00
	\$77.40	4				
Rationale for Motorcycle Officer usage:						
<b>Lieutenants</b>	Hourly Rate	4-Hr Min	Add'l Hrs	# Officers	=	\$0.00
	\$69.10	4				
Rationale for Lieutenants usage:						
					<b>Police Subtotal</b>	<b>\$0.00</b>

**Transportation & Maintenance:**

<b>Barricades</b>						
Base personnel costs = \$XXX						
Barricade minimum (if needed)					=	\$0.00
Barricades built (if needed)	Price/Barricade	# Barricades			=	\$0.00
	\$50.00					
Barricade drop-off (additional, if above X # of barricades)	Hourly Rate	# Hours	# PBOT personnel		=	\$0.00
<b>Signage for Detours</b>						
Signage for Detours	Hourly Rate	# Hours	# PBOT personnel		=	\$0.00
<b>Parking Meters</b>						
Parking meters	# Meters Covered	# Hours	Cost/Meter		=	\$0.00
Traffic Signal Modification	Cost	# Req			=	\$0.00
Ramps for Floats	\$288.00				=	\$0.00
Street Sweeping	\$288.00				=	\$0.00
<b>Portland Streetcar</b>						
Supervisors at intersections	Hourly Rate	# Hours	# Personnel		=	\$0.00
Extra operators					=	\$0.00
Rationale for extra streetcar personnel usage:						
					<b>Transportation Subtotal</b>	<b>\$0.00</b>
					<b>Police &amp; Transportation Subtotal</b>	<b>\$0.00</b>

<b>Permit Application Fee:</b>			=	\$200.00
<b>Event with Multiple Activities:</b>	Number of Activities	Additional Fee		
		\$200.00	=	\$0.00
<b>Late Permit Fee</b> (Application received less than 30 days before event) <b>Fee: \$300</b>			=	\$0.00
<b>Cost recovery of city services</b> (20% of Police/Maintenance Subtotal)			=	\$0.00
			<b>Total to pay</b>	<b>\$200.00</b>

# Fee Summary: categories, fees, insurance

	Cost Recovery (Police & PBOT services)	Event Type		Application Fee	Each Additional Event Activity Fee	Insurance	
1. Free Speech Events	0%	A. Free Speech Event		\$0	N/A	No	
2. Events that are free to participants (no fee events)	20%	A. Neighborhood Endorsed Event		\$100	\$100	\$1,000,000 min.	
		B. Special Event	2.B.a. Sidewalk Only	\$100	\$100	\$1,000,000 min.	
			2.B.b. Street Use	\$200	\$200	\$1,000,000 min.	
3. Events that charge a fee to participants (fee-based events)	40%	A. Special Event	3.A.a. Sidewalk Only		\$100	\$100	\$1,000,000 min.
			3.A.b. Street Use	3.A.b.i Obey all Laws	\$300	\$200	\$1,000,000 min.
				3.A.b.ii Street Closure	\$600	\$200	\$1,000,000 min.

- Integrates event type, type of use, and “events within an event” into new fee summary
- Differentiates between fee and no-fee events – a **top three** policy option determined by stakeholders at a joint stakeholder meeting
- Policies and fees applied evenly within each event category

Insurance details:  
TBD



## Why up to 40%?

- Charging **Free Speech Events** creates a public safety risk because it would increase the number of “rogue” events without city knowledge
- Free Speech events account for 5% of program city service costs under the new program – a small price for public safety and freedom of mobility
- **Events that do not charge a fee** tend to be smaller neighborhood or school events that build community spirit and capacity because anyone may participate free of charge
- Events that do not charge a fee tend to have smaller budgets: unlike free speech, these event pay for services, but at a lower rate
- **Events that charge a fee** tend to be fundraisers or business enterprises that also build community spirit – but for a cause – and because of sponsorships and participation fees have multiple revenue streams
- Events that charge a fee also tend to be larger, lengthier, street closures that use substantial public resources: incurring more administrative time and support services, generating the need for higher cost recovery

**All events have opportunities for cost-cutting by evaluating services, route, etc.**



## But we discussed to 20-30% in the meetings...

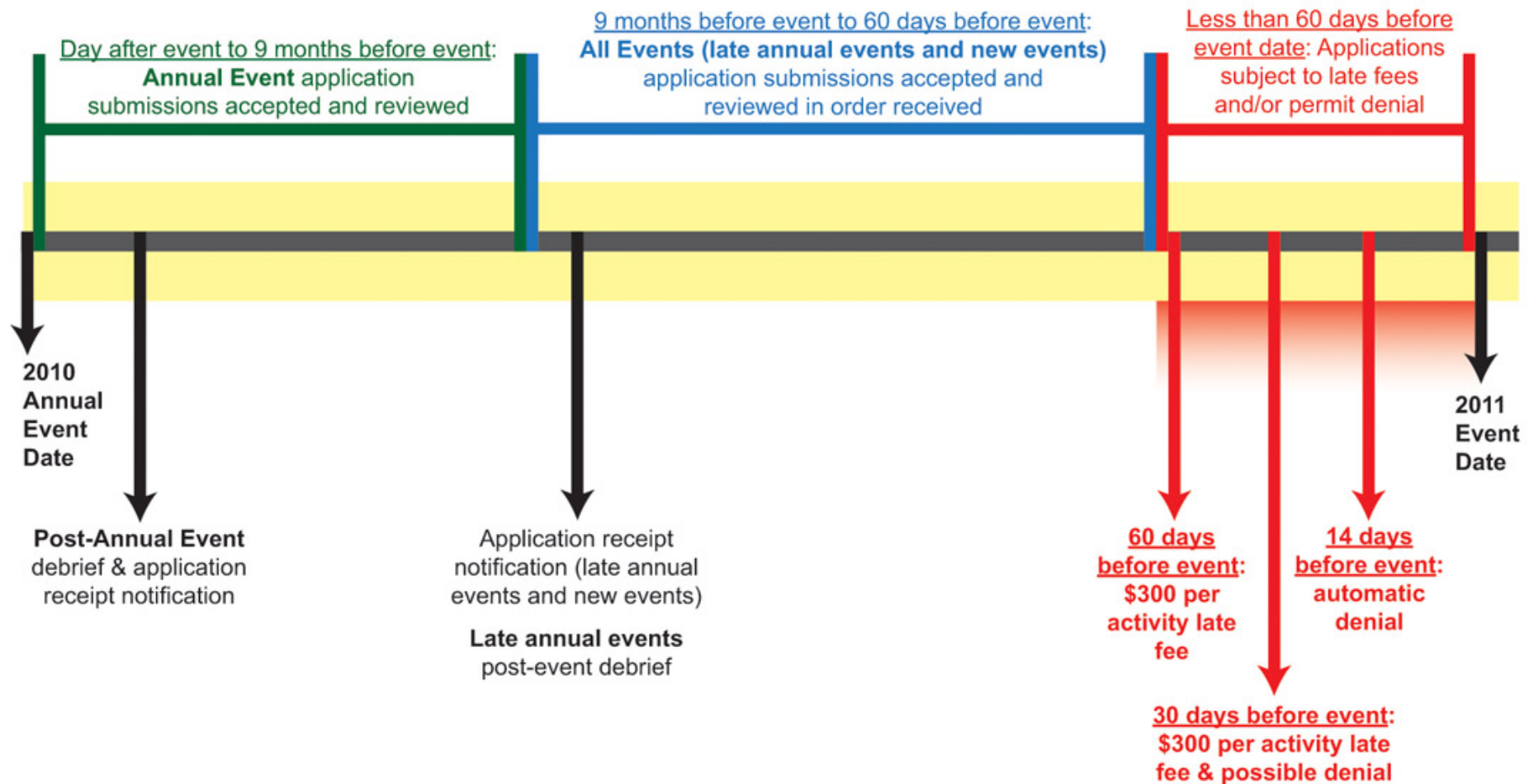
- Yes, we did.
- However, a few additional factors emerged:
  - On average, there are 10%-20% new events each year
  - At 20% cost recovery, actual costs to city bureaus to provide support services will increase quickly due to growth – increases the bureaus cannot sustain
  - Comparable cities recover between 60% and 100% of costs for special events; up to 40% is still below the national average



# Fee Process

- Application fee(s) submitted with application
- PBOT and Police SE Advisory Committee members determine if city support services are necessary
- PBOT and Police provide timely estimates of costs, services, cost reduction ideas, and invoice(s)
- SE Coordinator bills event organizer
- Between 0% and 40% cost recovery for city services
- Organizer remits cost recovery fees to Revenue Bureau at least 30 days before event to receive a permit

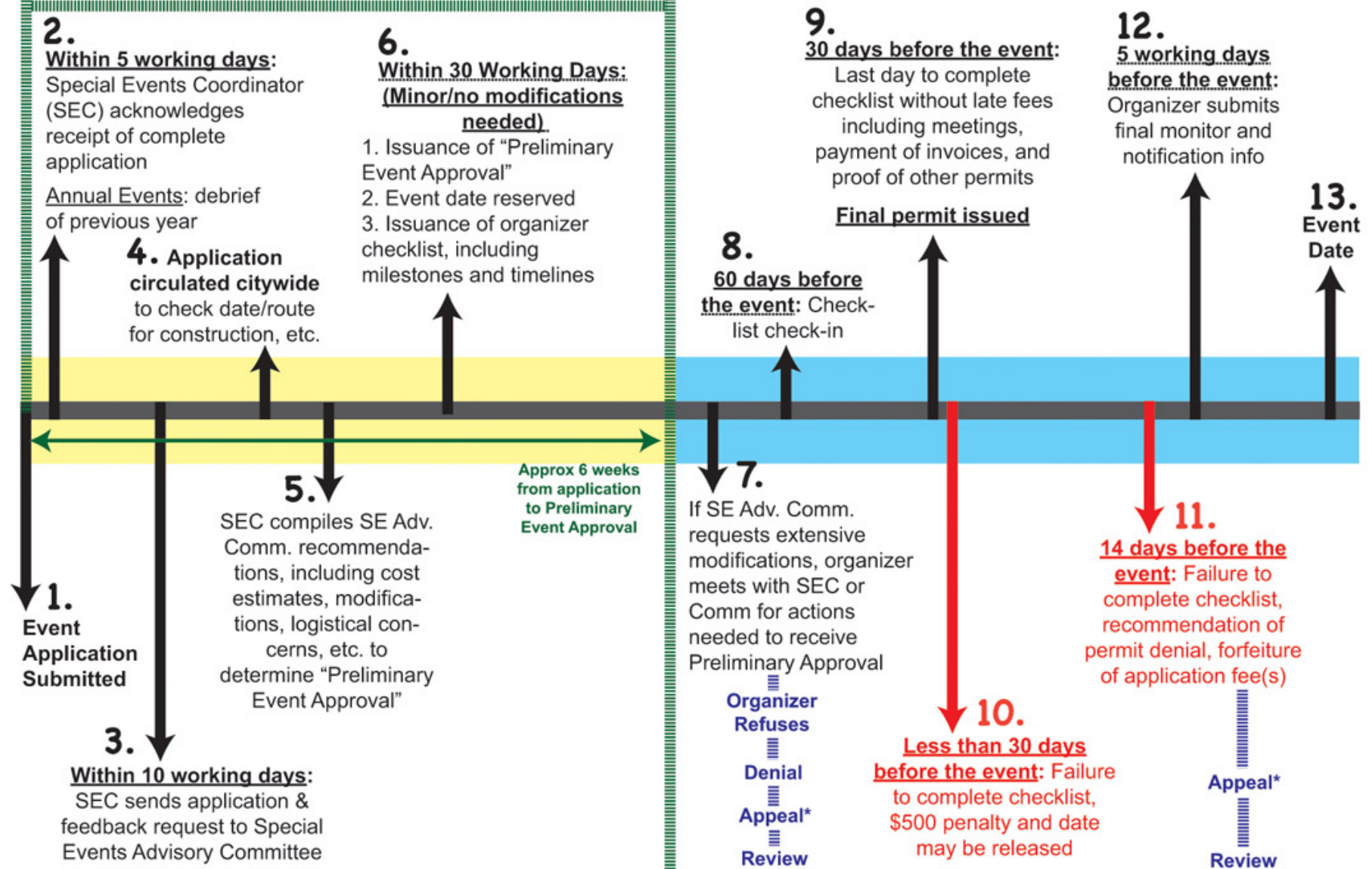
# Event Application Submission Timeline (non-Free Speech Events) Revenue Bureau Special Events Program



# Where does my application go?

## Event Application Review Process (non-Free Speech Events)

### From Application Submission to Preliminary Event Approval



\* Event organizers can appeal recommendations for permit denial at any point in the process.

# Application Review Process

- Application Review, Added Provisions: considerations of event's interference with transit system, adherence to all criteria in for street and sidewalk use, time considerations
- Preliminary Event Approval
  - Reserves the event date and preliminarily approves event
  - Includes a checklist, including milestones and a timeline of items the event organizer needs to complete to receive the final permit (i.e., cost recovery payment, insurance, notifications, and volunteer/monitor plan)
- Free Speech Events
  - Subject to same review process, but have flexible timelines
  - Special Events Program will not interfere with the right to free speech as it pertains to the content, time, place, or manner unless it withstands intermediate scrutiny



## Denial, Revocation & Termination

- Director or designee may deny, revoke or terminate permits or events during the application process, or day of the event:
  - Late, incomplete, misleading applications
  - Failure to pay, bad checks
  - Noncompliance with permit conditions on event day
  - Exceeds capacity
  - Emergency
- On day of event, police may ticket participants, organizers, spectators, or the public for violation of law, event interference, endangering public safety, etc.





## Appeals & Review Panel

- Late Fees, loss of event date reservation, and denial of application fee waiver ***cannot*** be appealed
- Denials, revocations, and fines may be appealed
  - Appeal filed no later than three (3) days after issuance of denial, revocation, modification, or fine.
  - Director convenes Administrative Review Panel with Revenue Bureau Director, PBOT Director, & Police Chief.
  - Organizer provides evidence
  - Final decision by Revenue Bureau Director no more than five (5) days following presentation of evidence
  - The Panel's decision may be appealed to City Council
  - Timetable can be expedited



Please contact me with any  
questions or concerns

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