

 **Metro** | *Agenda*

Meeting: Natural Areas Program Performance Oversight Committee
Date: May 4, 2010
Time: 7:30 to 10:30 a.m.
Location: Metro Regional Center, Council Chambers

7:30 a.m.	Welcome	Peter Krainock
7:35 a.m.	Financial update (staffing, FTEs and projections)	Kathleen Brennan-Hunter
8 a.m.	Communications update	Laura Oppenheimer Odom
8:30 a.m.	Break	
8:45 a.m.	Capital Grants program performance measures	Kathleen Brennan-Hunter
9:30 a.m.	Natural Areas program updates	Kathleen Brennan-Hunter
10:30	Adjourn	

Coffee, pastries and fruit will be provided

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Natural Areas Program Performance Oversight Committee

May 4, 2010

Committee members in attendance: Linda Craig, Christine Dupres, Dave Evans, Helena Huang, Kay Hutchinson, Don Jones, Peter Krainock (Committee Chair), Anil Krishnamurthy, Sindy Maher, Norman Penner, David Pollock, Steve Yarosh

Committee members excused: Dean Alterman, Bridget Cook, Rocky Dixon, John Esler, Tricia Martin, Jacquenette McIntire, Segeni Mungai, Dietra Stivahtis

Metro management: Council President David Bragdon, Councilor Kathryn Harrington, Kathleen Brennan-Hunter, Jim Desmond

Metro staff: Tim Collier, Paul Garrahan, Marybeth Haliski, Heather Kent, Jenn Marron, Mary Rose Navarro, Laura Oppenheimer Odom, Mike Wetter, Hillary Wilton

Welcome

Peter Krainock welcomed the committee and thanked them for coming. He noted several reports had been distributed, including the Natural Areas follow-up audit, which parallels the committee's recommendations and goals for the program. Kathleen Brennan-Hunter added that Metro's annual program update and a Nature in Neighborhoods Capital Grants program report were also included in the packet.

Program updates

Financial report. The financial statement was briefly reviewed. Peter asked about staffing costs, which seem very low compared to prior years. Tim Collier said staffing costs were split with direct administrative costs, and believed some expenditures had not yet been charged to the program. He will follow up.

Stabilization costs were also discussed; Kathleen felt expenditures are appropriate and on track. Peter noted that the auditor's report recommended developing a system to estimate future operating costs and asked how Metro has responded to this suggestion. Jim Desmond answered that staff will be conducting financial analyses over the next six months and will present a series of funding options and possibilities to the Metro Council. He added that Intertwine Alliance members are analyzing future maintenance and management costs for regional parks, as every parks provider is similarly challenged. Meanwhile, he said, Metro is taking care of what we have. A new stabilization staff person has recently been hired to support the Chehalem Ridge Natural Area. Peter said the committee would be interested to learn more about Metro's approach to operations and maintenance. Linda Craig indicated she was surprised how small a percentage stabilization costs are, and whether staff is monitoring the situation to determine if more could be done. Kathleen said one of the factors is that there is a two year window to complete stabilization activities, so staff is strategic about what they choose to do for stabilization, including taking care of existing habitat and planting to eliminate weedy conditions, then planning for follow up treatments and plantings.

Peter asked if there will be an increase in operations costs for additional FTEs because of the new acreage Metro has acquired. Jim said the increases were anticipated by the Metro Council and funds were allocated for Cooper Mountain and Graham Oaks Nature Parks and the Chehalem Ridge Natural Area. He added that an additional \$70,000 was recently reallocated for natural areas maintenance, via a 2004 excise tax increase made in anticipation of the additional operating burden.

Linda Craig asked about the current \$60 million fund balance and inquired when Metro planned to issue the remaining bonds. Tim said the expectation when the initial bonds were issued in 2007 was that Metro would go out for bond again this year, but finance staff has now determined that the remaining \$100 million in bonds will likely be split, with half issued in FY 2011/12 and half in FY 2013/14.

Staffing levels. Peter asked if Kathleen continued to believe staffing levels were adequate or if Metro would be able to do a better job with additional people. Kathleen said she still believes staff levels are appropriate. She noted that outreach for the capital grants program is perhaps the one place needing additional attention, but feels there are ways to do that without adding staff. Jim agreed that negotiator and due diligence staffing is adequate.

Acquisition. Kathleen noted there have been five acquisitions since the last meeting, including Chehalem Ridge, which at 1,143 acres is the largest area purchased by the Natural Areas program. Metro also acquired its first two trail easements, both along the Fanno Creek Greenway, closing a key gap of this important greenway. There was also a second acquisition in the Rock Creek target area, and one in the Johnson Creek target area that connects to previously acquired properties.

Peter asked if there are any target areas where Metro has substantially exceeded acreage targets and whether Metro would forego additional acquisition in those areas in favor of acquiring property in another area. Kathleen replied that Metro is not aggressively looking to purchase property in target areas where we have already met the refinement plan goals. Peter noted there were differences in price per acre among various target areas and asked if Metro perhaps needed to reevaluate the Tier I goals. Kathleen agreed that land is more expensive in some areas than in others, and noted that target area goals are limited accordingly. For example, in target areas where acreage is more available, the refinement plans specify that Metro will acquire more property than in those areas where available land is limited. Peter asked about Metro's strategy if there is no willing seller in a particular target area. Kathleen replied that Metro is still 2-3 years from having to deal with that scenario, but acknowledged that there are several 1995 target areas where Metro is still working to acquire property. She said there is a tradeoff between taking a long term strategy and waiting for willing sellers, and meeting the goals. Jim said it is hard to imagine an entire target area being totally unfeasible. He said Metro might shift the acquisition goals, rather than walking away. His experience is that over time, the relationships the negotiators have with landowners eventually produce results.

Trails. Kathleen briefly discussed the Implementation Work Plan that applies specifically to trails. The Metro Council passed this resolution (Res. 10-4122), which revised the original acquisition work plan (Res. 07-3766A), in February 2010. Closing memos and performance measure criteria have been revised specifically for trails acquisition.

Dashboard. Kathleen presented the draft dashboard, requested by committee members at the last meeting. The graphs track progress across various target areas and trail/greenway corridors based on refinement plan goals. The dashboard also shows status of the local share and capital grant programs. Peter suggested removing the dots notating 1995 goals, as he felt they did not relate to the 2006 bond program. Linda Craig suggested side-by-side stacked bars showing acreage goals and percent completed for each target area, for both the 1995 and 2006 programs. David Pollock asked if the blue bars were based strictly on acquisition or refinement plan goals, and if acreage goals could be defined differently from other refinement plan goals (i.e., opening a park). He also suggested removing the 1995 dots and adding the acreage goals for each target area along the right side. Kathleen asked members to let her know if they have other suggestions for refining the form.

Communications update

Communications coordinator Laura Oppenheim Odom discussed upcoming communications initiatives, including a series of summer tours at Chehalem Ridge Natural Area and planning for the Graham Oaks Nature Park opening in late summer. She introduced Jenn Marron who will assist with natural areas event planning, focusing on the Graham Oaks opening. Laura said the opening is an exciting opportunity to engage the community and tell the broader natural areas story. In addition, the Graham Oaks events will launch a major public outreach campaign. The natural areas portion of the Metro website will undergo a major upgrade and will include such content as interactive maps, videos telling the story of restoration work, blogs from site stewards, etc. Peter asked how the Graham Oaks celebrations and web site revisions will be funded. Laura indicated there was \$300,000 in the FY 2010/11 budget dedicated for these projects. David Pollock suggested asking businesses to help sponsor some of the events. Linda Craig asked if there are any constraints in spending bond measure money on communications initiatives. Jim said there is no set percentage or dollar limitation in the bond language. Metro is very cautious about spending. But he noted that both the auditor and the committee has suggested that Metro has not done enough communication outreach in the past. Laura agreed that staff has to find more sophisticated and bolder ways of communicating and noted that Metro has recently launched Facebook and Twitter accounts and people can also subscribe to Metro's planning and policy news feed. The Communications team is building a following beyond the traditional newspaper audience. Councilor Harrington added that she and her fellow councilors often have the opportunity to promote the program at regional meetings and events. She has heard a lot of positive feedback about parks and natural areas. Helena Huang asked if there has been any polling done about Metro's identity. Jim replied that there are intermittent polls and focus groups pertaining to that question and the roles of government in general, and that Metro usually rates higher than other local governments. The good news is that Metro does not get a lot of negative reviews; the bad news is that many people still don't know what Metro does. David Pollock agreed there is a need to create greater awareness.

Intertwine presentation

Council President David Bragdon provided an overview of the Connecting Green/Intertwine initiative. Began nearly three years ago, the initiative has now formalized as the voluntary Intertwine Alliance (see The Intertwine Alliance annual report and attached PowerPoint presentation). Peter asked who is providing the overall leadership and coordination. President Bragdon said a core group including Metro, Tualatin Hills Park and Recreation District, Audubon, Trust for Public Land and TravelPortland have all donated leadership time and have significant interest in the project. He said it is a non-hierarchical organization and while chairmanship has rotated, The Intertwine has not yet become that formal. He noted the program is very unconventional for the government sector. Christine Dupres asked what some of the priorities are. President Bragdon said the committee has been somewhat opportunistic, putting effort into projects other organizations are involved in and joining forces for federal funding. He said initial focus has been on brand recognition, signage, trails and creation of the website. Peter asked if the federal government is interested in providing funding for such a initiative. President Bragdon said that is the coalition's hope, but acknowledged funding will be limited due to the deficit, so the group is looking for unconventional partnerships. Linda Craig asked if a system was in place to track or measure such leverage. President Bragdon said it is something they have discussed, but nothing is in place at this time. Mike Wetter reviewed the makeup of the alliance (see page 10 of the annual report).

Nature in Neighborhoods Capital Grants update

Kathleen discussed the new performance measures for the capital grants program. Acquisition closing memos indicate how each purchase fits into refinement plan goals. The same model will be applied to both trails acquisition and capital grants programs. She distributed the new capital grants criteria scoring sheet, and noted the outcomes assessment, which will be completed once the project has concluded. Kathleen

said the performance measures chart will be accompanied by a narrative similar to the acquisition closing memos. Peter asked if staff could provide an outcomes assessment on any projects at this time; Kathleen indicated no projects were complete yet, but close. She said that staff will complete the first section now for all the projects, and then revisit the second section next year as projects reach completion.

Announcements

Peter reported that committee member Rocky Dixon has moved out of state and has resigned from the committee.

Kathleen noted that real estate negotiator Hillary Wilton will be assuming some of Kathleen's acquisition-related duties while Kathleen is out of the office. Jim Desmond will oversee the non-acquisition aspects of Kathleen's position (Nature in Neighborhoods, Science and Stewardship, etc). Committee members should feel free to contact Hillary (hillary.wilton@oregonmetro.gov) or Jim (jim.desmond@oregonmetro.gov) with questions.

Norman Penner announced that the Tualatin River National Wildlife Refuge will host the 14th annual migratory songbird festival, 10 a.m. to 2:30 p.m. on Saturday, May 15.

Peter noted this will be his last meeting as committee chair. He thanked everyone for their participation and support. President Bragdon thanked Peter for his support and sense of discipline around the program. Kathleen agreed and said Peter had added a lot of value and helped tremendously with the program. Peter announced that Linda Craig has agreed to take on the chairpersonship, effective July 1. Linda said Peter set the tone for the committee, which will make her tenure easier.

President Bragdon noted that several other committee members are also completing their terms of service and thanked them for their commitment to the program. He said he will be recruiting new members this spring.

Next meeting

Kathleen and Linda Craig will meet to discuss the committee's agenda for the coming year and decide whether the committee should meet again before September, when Kathleen returns to the office.

Adjournment

The meeting adjourned at 10:15 a.m.

2006 Natural Areas Bond FundSummary of Resources, Requirements and Changes in Fund Balance
(Unaudited)

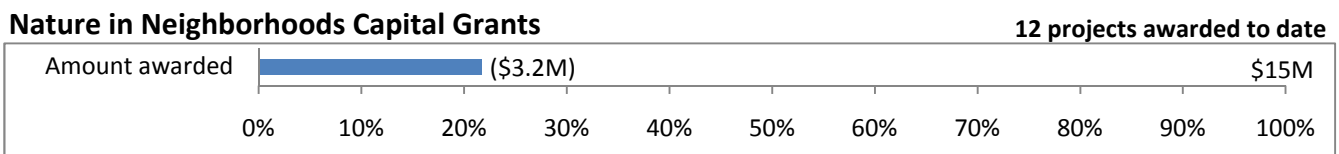
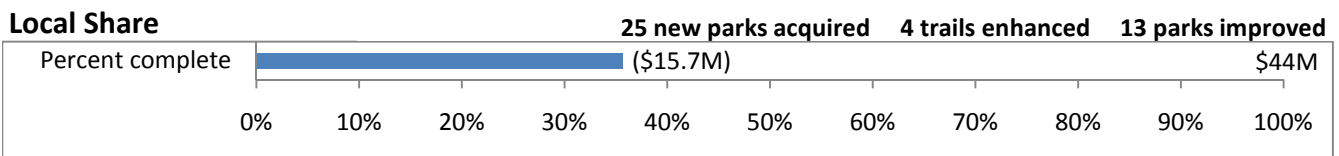
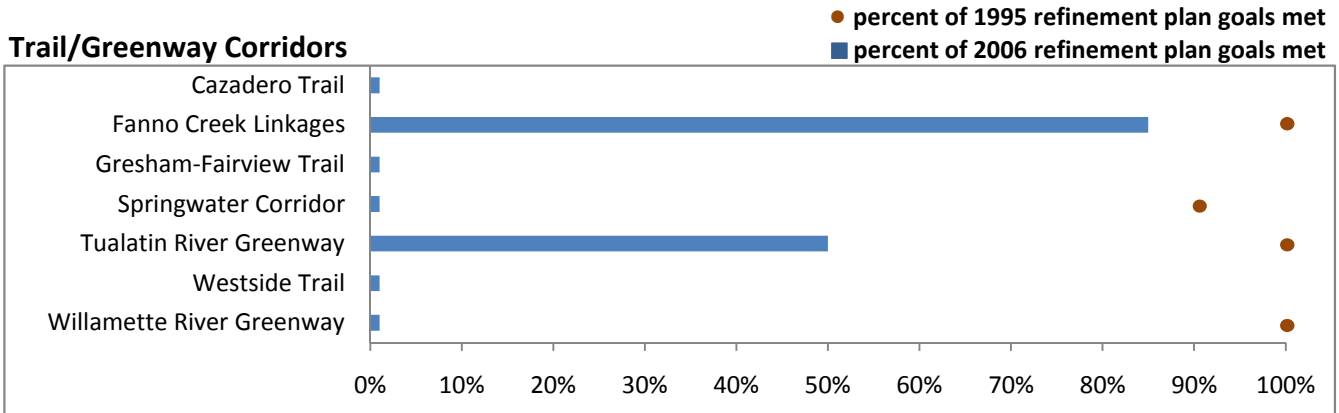
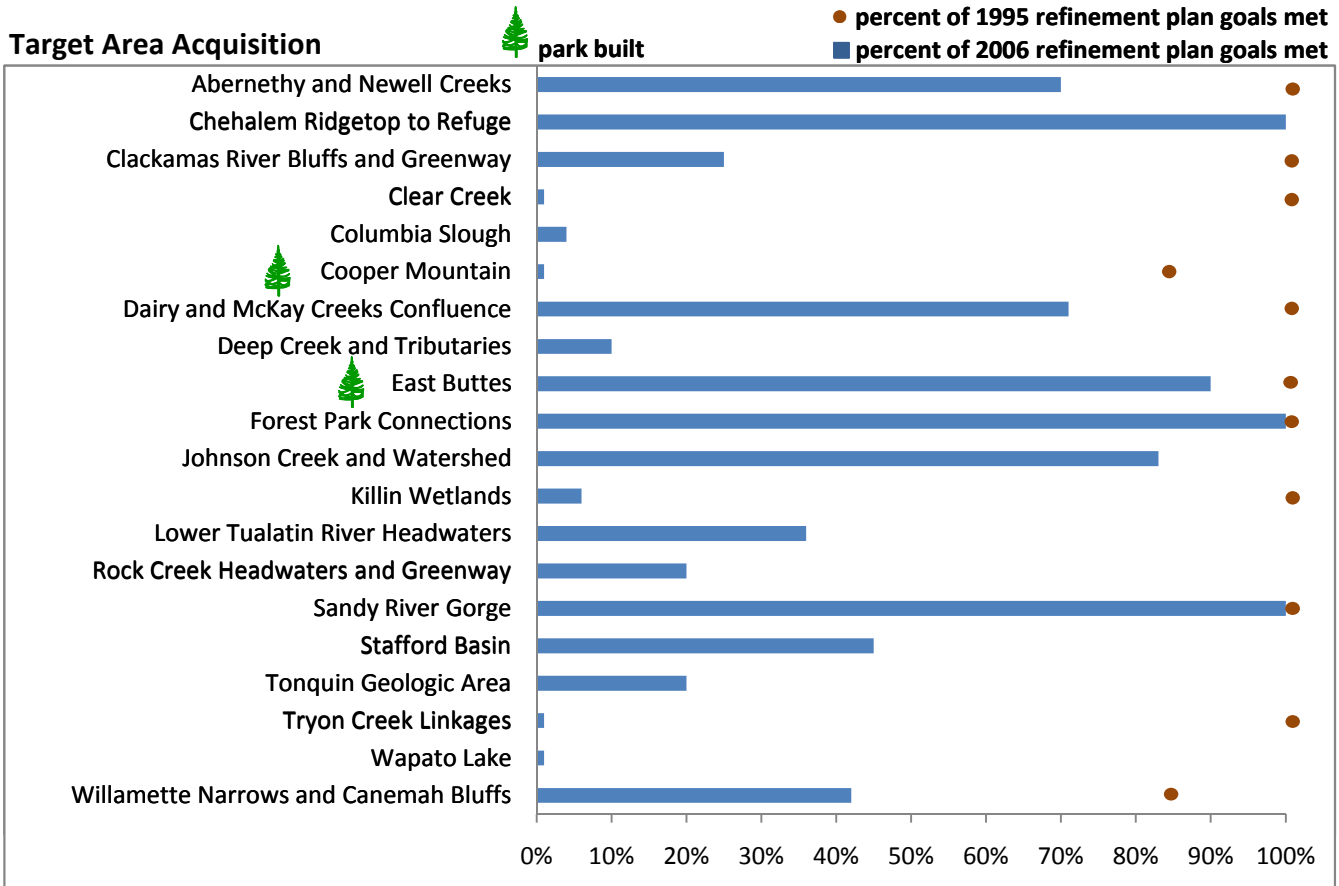
	FY07		FY08		FY09		FY10 as of March 31, 2010		Program Total
	Amount	FTE	Amount	FTE	Amount	FTE	Amount	Amount	
Beginning Fund Balance	0		122,299,840		93,979,814		77,117,027	0	
Resources									
Bond Proceeds	130,678,369		0		0		0	130,678,369	
Interest Earnings	1,301,230		5,600,503		2,538,906		522,221	9,962,861	
Other Resources	10,000		27,380		5,322,056		39,263	5,398,698	
Subtotal Resources	131,989,599		5,627,883		7,860,962		561,484	146,039,928	
Requirements									
Land Acquisition									
Staff Costs	117,956	4.50	206,692	5.50	425,072	5.50	343,746	1,093,482	
Materials & Services	6,786		2,599		334,980		6,826	351,191	
Land Costs	7,596,372		25,224,753		14,517,160		8,655,264	55,993,549	
Due Diligence									
Staff Costs	0	5.00	412,029	5.00	492,589	5.00	355,739	1,260,371	
Materials & Services	96,539		199,756		183,474		226,023	705,792	
Stabilization									
Staff Costs	19,578	3.40	116,534	3.40	190,606	3.40	209,157	535,884	
Materials & Services	294		177,441		345,330		228,551	751,615	
Local Share									
Staff Costs	0	0.63	36,269	0.63	43,872	0.63	35,683	115,826	
Materials & Services	0		25		188		34	246	
Payments to Jurisdictions	400,000		4,798,366		4,316,165		4,678,258	14,192,789	
Capital Grants									
Staff Costs	0	0.87	63,831	0.87	89,352	0.87	34,463	187,649	
Materials & Services	0		1,400		1,363		588	3,351	
Grant Payments	0		0		49,750		529,500	579,250	
Capital Construction									
Staff Costs	0	0.80	84,071	0.80	113,921	0.80	85,270	283,264	
Capital	455,072		1,513,347		2,503,147		1,337,768	5,809,334	
Administration									
Bond Issuance Costs	295,889		0		0		0	295,889	
Refinement									
Staff Costs	1,477		5,426		0		0	6,903	
Materials & Services	382,030		85,882		0		0	467,912	
Direct Admin Costs									
Staff Costs	230,815	4.83	527,644	4.83	490,722	4.83	135,959	1,385,154	
Materials & Services	25,980		152,422		51,490		33,233	263,125	
Indirect Admin Costs*	60,971		339,422		574,569		443,935	1,418,897	
Other Requirements	0		0		0		0	0	
Subtotal Requirements	9,689,759	20.03	33,947,909	21	24,723,748	21	17,339,996	85,701,474	
Ending Fund Balance	122,299,840		93,979,814		77,117,027		60,338,516	60,338,516	
	FY07		FY08		FY09		FY10 YTD	Total	
Administration as % of Total Expenditures	10.29%		3.27%		4.52%		3.54%	4.48%	

* Indirect Administrative Expenses are those charged through internal allocation, and include services such as Human Resources, risk management, payroll, building rents, etc.

Note: Due Diligence staff costs have been removed from "Indirect Admin Costs" and the FTE for these positions is shown as a direct expense.

Natural Areas Program

May 4, 2010



Nature in Neighborhoods Capital Grants Criteria Scoring Sheet

Project Name: _____ Partner: _____

Criteria	Score			Comments
Community engagement	High	Medium	Low	
Re-Green	High	Medium	Low	
Re-Nature	High	Medium	Low	
Multiple benefits (for people and natural systems)	High	Medium	Low	
Cost-effective ecological design (Integrating Habitats)	High	Medium	Low	
Access to nature (ADA)	High	Medium	Low	

Outcomes Assessment (to be measured following project completion)

Catalytic beyond the project itself	High	Medium	Low	
Leverage	High	Medium	Low	
Project administration	High	Medium	Low	

Please sign and date

Mary Rose Navarro _____ Date _____

Heather Kent _____ Date _____

Scientist (*optional*) _____ Date _____

Kathleen Brennan-Hunter _____ Date _____

Key Criteria (to be measured at project award)

Community engagement

- High The project or property acquisition initiates a new or expands an existing relationship between partners/organizations and is designed to provide diverse and significant community engagement in the project.
- Medium The project or property acquisition initiates a new or expands an existing relationship between partners/organizations.
- Low The project or property acquisition engages typical and obvious community partners.

Re-Nature

- High The project or property has four features essential for wildlife: food, cover, limited human disturbance and special habitat features OR is known to have native fish present (or is likely to have after restoration is completed).
- Medium The project or property cannot achieve more than three of the four main wildlife habitat features BUT includes preservation or restoration of stream frontage, headwaters, confluence areas, springs, seeps, wetlands or floodplains (OR is within 200 feet of a stream, wetland or floodplain area).
- Low The project or property cannot achieve more than two of the four main habitat features and is not associated with a water feature (stream, wetland or floodplain area).

Re-Green

- High The project or property enriches people's experience of nature by increasing the presence of water, trees and other vegetation in a nature-deficient area.
- Medium The project or property enriches people's experience of nature by increasing the presence of water, trees and other vegetation in any area.
- Low The project or property does not significantly enhance people's experience of nature.

Multiple benefits

- High The project or property demonstrates multiple benefits for both people and nature.
- Medium The project or property demonstrates multiple benefits for either people or nature.
- Low The project or property demonstrates limited benefits for people and nature.

Cost- effective ecological design – Integrating Habitats

- High The project supports sustainable urban development goals by integrating habitat or water quality improvements through innovative project design and is a first of its kind in the region.
- Medium The project supports sustainable urban development goals by integrating habitat or water quality improvements through innovative project design and is a first of its kind in the area.
- Low The project supports sustainable urban development goals by integrating habitat or water quality improvements through innovative project design.

Provides people with access to nature – ADA

- High The project or property is specifically designed to enhance access to nature for people with disabilities.
- Medium The project or property meets the standard for ADA accessibility.
- Low The project or property does not provide or improve access for people with disabilities.

Outcomes Assessment (to be measured at project completion)

Catalytic beyond the project itself

- High Applicant has met or made every attempt to achieve all performance measures identified in their grant agreement.
- Medium Applicant completed project successfully, at least one of the performance measures identified in the grant agreement will not be achieved.
- Low Project was completed but the benefits anticipated were not realized.

Leverage

- High The project leveraged at least \$2.50 for every \$1 of grant funds.
- Medium The project leveraged at least \$2 for every \$1 of grant funds.
- Low The project could not meet the matching requirements of the grant program and therefore did not receive the full grant allocation.

Project administration

- High All project benchmarks were met in a timely fashion and the project completed within the original contract term.
- Medium Benchmarks were not met in a timely fashion and the contract term needed to be extended.
- Low The project was not successfully completed.

Trails Acquisition Criteria Scoring Sheet

Property Name: _____ Target Area: _____

Negotiator: _____ Scientist: _____ Planner: _____

Criteria	Score			Comments
Connectivity	High	Medium	Low	
Access to nature	High	Medium	Low	
Scenic value	High	Medium	Low	
Trail usability timeframe	High	Medium	Low	
Trail gap completion progress	High	Medium	Low	
Land use	High	Medium	Low	
Transportation	High	Medium	Low	
Wildlife habitat quality	High	Medium	Low	
Price relative to market value	High	Medium	Low	
Partnership	High	Medium	Low	

Please sign and date

Scientist _____ Date _____

Negotiator _____ Date _____

Planner (*optional*) _____ Date _____

Kathleen _____ Date _____

Recreational benefits

Connectivity

- High Trail will directly access another trail, park or public natural area.
- Medium Trail will be within a half-mile of another trail, park or public natural area.
- Low Trail will not be within a half-mile of another trail, park or public natural area.

Access to nature

- High Acquisition improves access to nature in a trail/nature deficient area.
- Medium Acquisition improves existing access to nature.
- Low Acquisition does not improve access to nature.

Scenic value

- High Acquisition has high scenic value with vistas, access to water and/or a natural setting.
- Medium Acquisition has some local/neighborhood scenic value.
- Low Acquisition has little or no scenic value.

Trail usability timeframe

- High Trail will likely be built within 0-3 years.
- Medium Trail will likely be built within 3-6 years.
- Low Trail will not likely be built within 6 years.

Trail gap completion progress

- High Acquisition completes a trail gap (parcel has existing, adjacent trail ROW property on two sides).
- Medium Acquisition parcel has existing, adjacent trail ROW on one side.
- Low Acquisition parcel has no existing, adjacent trail ROW on either side.

Ancillary benefits

Land use

- High Trail will facilitate sustainable urban development goals within a 2040 Regional Center.
- Medium Trail will support sustainable development outside a Regional Center.
- Low Trail is not associated with sustainable urban development goals.

Transportation

- High Trail will accommodate active transportation trips within a regional mobility corridor.
- Medium Trail will connect to a regional mobility corridor as an auxiliary facility.
- Low Trail will not be within a regional mobility corridor.

Wildlife habitat quality

- High Acquisition will contribute to the protection of high-quality wildlife habitat.
- Medium Acquisition will contribute to the protection of moderate-quality wildlife habitat.
- Low Acquisition will not directly benefit wildlife.

Financial benefits

Price relative to market value

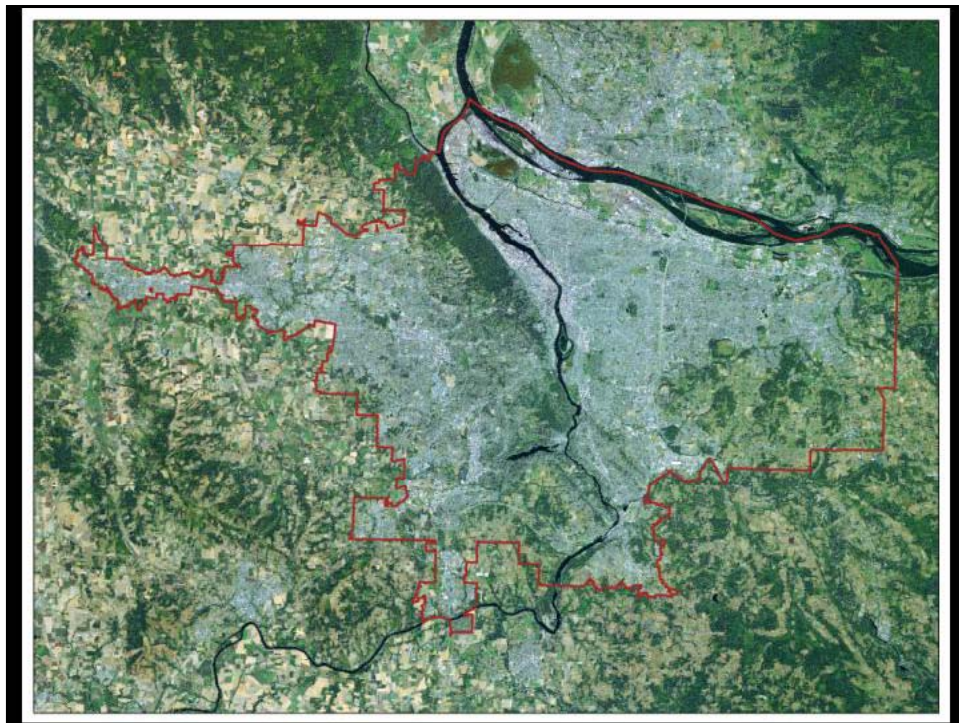
- High The property acquisition included a significant donation or purchase price less than the appraised value. (Donation greater than 10% of total purchase price or purchase price 10% less than the appraised value).
- Medium The property acquisition included no donation, but was purchased for less than appraised value.
- Low The property acquisition was purchased for more than the appraised value and included no donation.

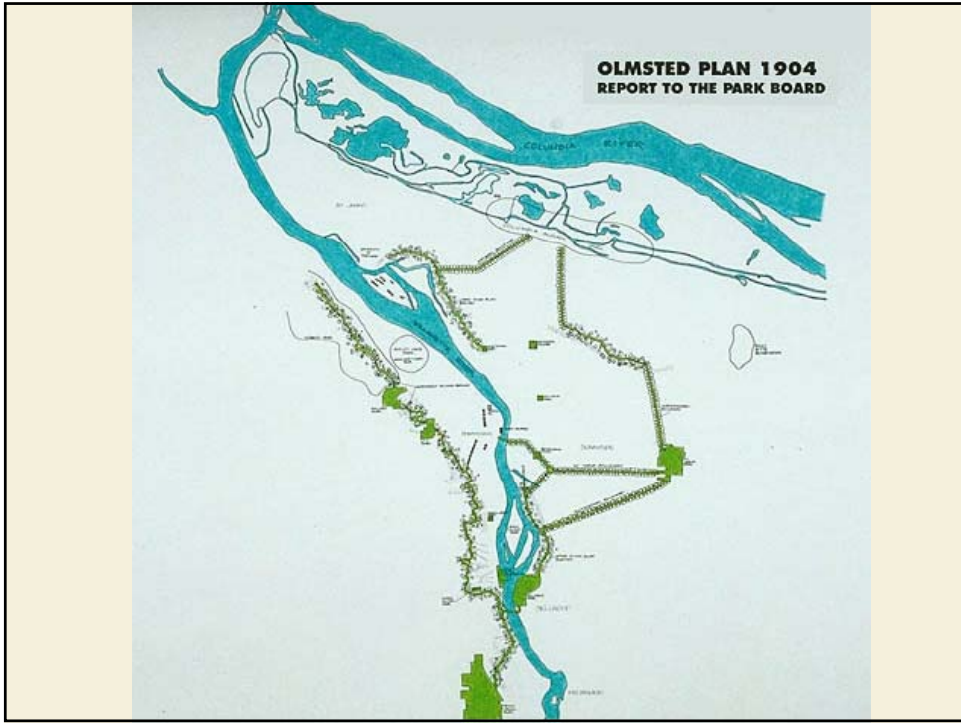
Partnership

- High The property purchase included a significant contribution from a local partner or the partner is providing long-term land management as part of their contribution.
- Medium The property purchase included a small contribution from a local partner.
- Low The property purchase was completed solely by Metro and included no local partner contributions.

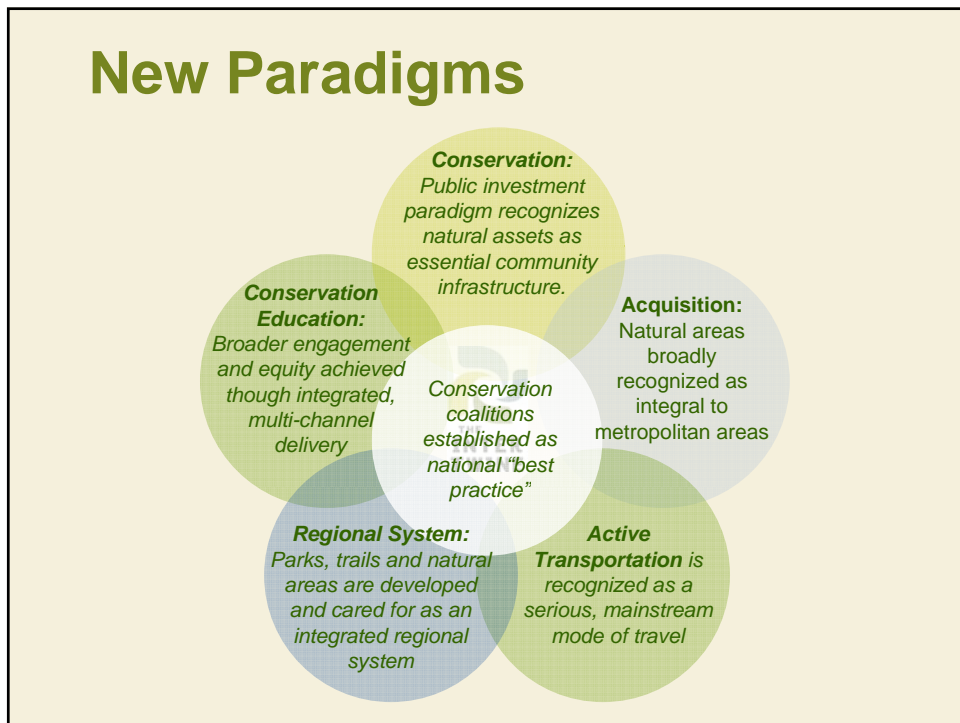
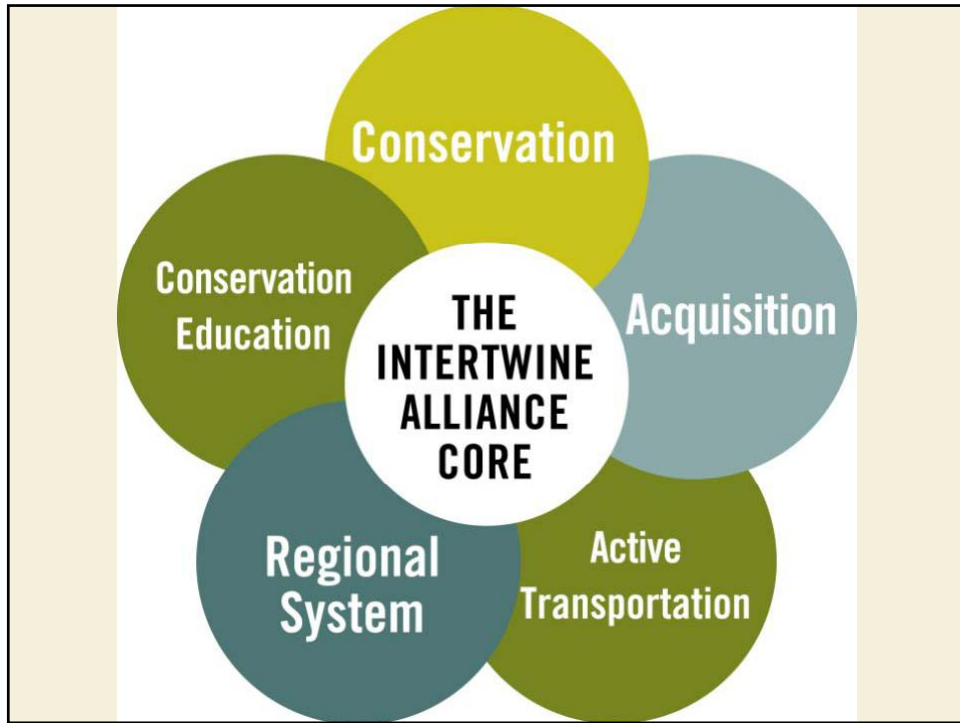
The Intertwine

Metro Council President David Bragdon











Active Transportation

- Case and Strategy
- Active Transportation Corridors
- Active Transportation Council
- New State Trail Fund
- Increased MTIP
- Active Transportation Corridors
- City of Portland Bicycle Plan
- Reducing Federal Barriers
- Increased Federal Investment

Regional System

- Parks Directors Forums
- Region-wide Signing
- System Analysis
- Bi-State Trail Plan
- Funding Measure(s)

Lewisville Park





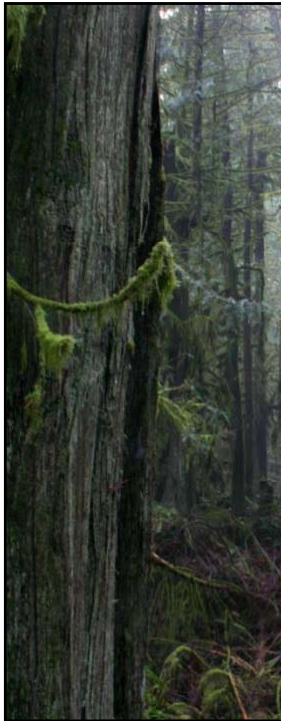
Conservation

- Regional Conservation and Biodiversity Framework
- Collaborative Restoration
- Urban and Rural Reserves Mapping
- Ross Island
- Oaks Bottom Wildlife Refuge
- Regional Conservation Plan



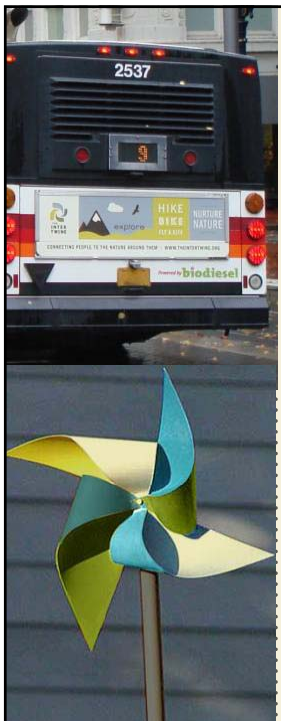
Conservation Education

- \$1.4 million to Outdoor School
- Wild in the City: Exploring The Intertwine
- Assessing Outcomes



Acquisition

- 1995 Metro Bond
- 2005 Clark County Bond
- 2006 Metro Bond
- 2008 THPRD Bond
- City of Portland 1,500 acres
- Chehalem Ridge Acquisition
- Cougar Creek Woods
- Ross Island



Intertwine Core


- Founded Organization
- New Name, Logo and Brand
- Public Launch of the Brand
- New Website
- Marketing Work Group
- Co-Branding
- Events
- Fully-Featured Website
- National Coalition

Goal: Many Independent Providers One Integrated System



Why Does it Work?

- Regional in scope
- Leverages investment
- Leverages competencies
- Broad-based inc. non-usual suspects
- Multiple, interconnected outcomes
- Strategic; sets priorities
- Highly visible
- Connects people with nature
- Increases investment



What's On The Horizon?

- New Programs from US Dept of Interior
- New Programs from US DOT
- Ballot Measures
- Continued Brand Rollout
 - New Website
 - Events
 - Signing
 - Radio, merchandise, publications...

David Bragdon, President Metro Council

www.TheIntertwine.org

www.OregonMetro.gov



explore

HIKE
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BIKE
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FLY A KITE

THE
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TWINE

Staying on course

A report to the community from the Natural Areas Program Performance Oversight Committee

The oversight committee believes that Metro has responded well to the challenges of the economic downturn, enabling the Natural Areas Program to continue to meet its goals.

The past year has been a time of significant economic upheaval for the nation and the Portland metropolitan area. People and programs at every level of the public and private sector have been affected. What impact has the recession had on Metro's Natural Areas Program?

The Natural Areas Program Performance Oversight Committee directed considerable attention to this question during its second year of work. As an independent citizen committee, we provide third-party oversight of the Natural Areas Program to the Metro Council and citizens. Our charge is to determine how well the program is performing and if it is fulfilling the stated goals of the 2006 bond measure that funds it. We help ensure that Metro's work is transparent to the public. We also suggest changes that we think would improve program implementation.

Last year, our first annual report focused on the processes, staffing and outcomes of the program's first full year of operations. Published in October 2008, it also recommended five areas the committee and Metro should direct their attention to in the year ahead.

As designated in the 2006 bond measure, Metro's **Natural Areas Program** acquires and preserves natural areas throughout the region to safeguard water quality, protect fish and wildlife habitat and ensure access to nature for future generations. The program has three components:

Regional natural areas: The acquisition of 3,500-4,500 acres from willing sellers in 27 target areas (\$168.4 million).

Local projects: \$44 million allocated to local governments for park improvement projects and locally important acquisitions.

Nature in Neighborhoods capital grants program: \$15 million for grants to community groups, nonprofits and local governments for projects that "re-green" or "re-nature" neighborhoods.

As 2008 and 2009 proceeded, it became clear to us that the most critical issue we needed to address was how the program was responding to the altered economic climate, in terms of land acquisition and overall program performance. Much of our time was devoted to this overriding concern: Has the program been able to stay on course? We also reviewed Metro's response to last year's recommendations.

This second annual report covers our work from July 2008 through December 2009. It is grouped into three main areas of inquiry, which together encompass both the topics of interest brought forward from last year and the pressing economic considerations that subsequently arose.



Last year's committee recommendations

- Strengthen outreach for both land acquisitions and capital grants.
- Learn from every contact.
- Strive for equitable distribution of capital grants.
- Develop additional tools and metrics to help monitor and evaluate the program.
- Think big regarding how to leverage the program with other regional efforts.

OVERSIGHT COMMITTEE MEMBERS

◆ Peter Krainock (chair)	CEO, American International Supply Inc.
● Dean Alterman	Attorney, Folawn, Alterman & Richardson LLP
● Bridget Cooke	Executive director, Adelante Mujeres
◆ Linda Craig	CPA, Linda S. Craig LLC
◆ Rocky Dixon	Principal, Endeavor Capital
● Christine Dupres	Sustainability officer, Native American Youth and Family Center
● John Esler	Project manager, Portland General Electric
◆ David Evans	Corporate controller, ODS Companies
■ Michele Frank	Executive vice president, asset management, ScanlanKemperBard Companies
◆ Helena Huang	Independent philanthropic consultant
● Kay Hutchinson	Director of programs, REACH
◆ Don Jones	Vice president and manager, Bank of the West, Forest Grove
◆ Anil Raj Krishnamurthy	Associate, development services, Pacific Security Capital
■ Jill Long	Real estate attorney, Lane Powell
■ Lori Luchak	Vice president, Miles Fiberglass and Composites, Inc.
● Sindy Maher	Attorney, Dunn Carney
● Tricia Martin	Holistic health counselor and Food Loyal founder
◆ Jacquenette McIntire	Quality administrator, Max-Viz, Inc.
◆ Segeni Mungai	Member of Metro Committee for Citizen Involvement and community organizer
● Norman Penner	Past president and current board member, Friends of Tualatin River National Wildlife Refuge
◆ David Pollock	CEO, Stormwater Management (retired); director, Ecotrust Forest LLC
■ Sylvia Roll	Real estate broker, Grubb and Ellis
● Dietra Stivahtis	Vice president, Fidelity National Title
● Steve Yarosh	Real estate broker, Irma Valdez Properties

Term(s) of service: ◆ 2007-09 and 2009-11 | ● 2009-11 | ■ 2007-09

grants review committee to review Metro's response to our recommendations and assess what progress has been made. Our general findings below are followed by our assessment of last year's recommendations.

- Staff has responded positively to the committee's suggestions, and the program has strengthened and developed.
- The independent grants review committee comprises highly qualified people with diverse backgrounds and experience.
- Good project criteria have been developed for evaluating and selecting grant projects.

An extraordinary amount of time and effort have gone into the capital grants program, and the momentum is building. I am struck by how entrepreneurial and innovative the team has been, and appreciate the flexibility as well as the hard questions being asked about outcomes and measures. – Helena Huang

Strengthen outreach for the capital grants program and strive for equitable geographic distribution of capital grants.

- Outreach has expanded, with greater attention given to working with local community groups to encourage and improve potential projects. As a result, the number of inquiries, letters of interest and applications has increased.

People are coming forward and applying for the grants – a very positive reinforcement of Metro's goals. – Segeni Mungai

The program is hitting its mark. We need to continue outreach to encourage applications. This could include working with other granting organizations to make sure they know this program is available. – Dean Alterman

- Most projects in the first round of grants were located on the east side. The second round of grants and third group of applications are more diversified, with a greater geographic distribution throughout the region.

There has been a real investment of time and effort to do the right thing. Because larger, better organized, better resourced groups may have an advantage, Metro should continue to work with a variety of applicants to ensure broad access to these grants. – Christine Dupres

Recommendations

- The capital grants program is on track for now, but the oversight committee would like to meet with the grant review committee members in another year to determine if any changes are needed.
- The oversight committee recommends continued outreach and assistance to encourage applications from organizations of diverse size, type and location in the region.

The capital grants program is a fantastic model. I like how it models the foundation style of grant giving and how it requires commitment from participants. – Steve Yarosh

Land acquisition in the current economic climate

The committee was concerned about how the recession might affect land acquisition for the Natural Areas Program. Because acquisitions are based on appraisals of real market conditions, prices changed as real estate values changed. Metro is frequently interested in properties that are not actively on the market, and some potential sellers may consider current prices to be too low to sell. Another issue was whether Measure 49 land use claims and pending urban and rural reserve decisions were slowing the acquisition process. We spent considerable time with Metro's real estate negotiators to discuss the challenges they were facing and how they were responding.

- We found the negotiators to be a skillful, tenacious team. The real estate professionals on our committee commend the level of expertise the team brings to its work.
- The negotiators have worked closely with potential sellers to come to terms with current appraised values compared to values of past years.
- Acquisitions have continued in spite of the recession and delays caused by Measure 49. As a result, Metro's purchases are on track with the program's overall acquisition goal.

When you approach property owners who don't necessarily have the expectation to sell, you are dealing with people who are prepared to wait out the economy. Acquisition under these circumstances reflects good, sharp negotiating skills. – John Esler

Metro's response to the following two recommendations from last year also helped strengthen the program's ability to function in this economic climate.

Strengthen outreach to the public and land owners.

- Metro's communication staff expanded their efforts to communicate the goals and accomplishments of the program. To do so, they used a variety of techniques, including social media, the press, e-mail, tours, events and new signage.
- Metro's negotiators focused on building relationships, providing information and addressing the concerns of property owners.

Learn from every contact made in regard to land acquisition.

- Committee members with real estate experience noted last year that more can often be learned from transactions that do not close than from those that do. In response, the Metro team is giving greater attention to gathering and discussing data from both successful transactions and unsuccessful approaches.

It is great to be working with a government entity where people are learning, listening and implementing suggestions from our committee. This is a very good system, with excellent people and leadership who get the job done. – David Pollock

Nature in Neighborhoods capital grants program

Last year, we found that the Natural Areas Program had been successfully launched with the right processes and staffing in place to implement the voters' direction. We noted, however, that community response had been slow to the Nature in Neighborhoods capital grants program. We asked Metro to work to increase public interest and participation in that program. This year, the committee met twice with the program's staff and the volunteer

Program efficiency and effectiveness

The oversight committee determined last year that the staffing and processes in place during the first year of the Natural Areas Program were serving the stated goals of the 2006 bond measure. We revisited this issue again this year, particularly in light of the region's changed economic circumstances. At each committee meeting, we reviewed expenditures to date. We also reviewed the overhead allocation that Metro assigns to programs.

- Staffing levels and administrative overhead appear to be appropriate. We find that the program is spending tax dollars efficiently.

In addition, the committee considered the status of the following two recommendations from last year.

Develop additional tools and metrics to help monitor and evaluate the program.

- In the first year, the oversight committee worked with staff to develop performance measures for the land acquisition program. These have now become an integral part of evaluating every land acquisition. Metro continues to refine the performance measures in order to use them to best advantage.
- In year two, the committee focused on crafting a unique model of performance measures for the Nature in Neighborhoods capital grants program. This work is still in progress.
- At the committee's request, Metro has refined the Natural Areas Program financial report to account for the three program components separately.

Think big.

The oversight committee recommended last year that Metro should think big in considering how best to leverage the Natural Areas Program with other regional efforts. In the ensuing year, Metro has pursued several initiatives to that effect.

- Metro has looked to other regions and cities to see how they have developed their regional parks, natural areas and trails programs, including Chicago, St. Louis, the Twin Cities in Minnesota, and the East Bay Regional Park District in Oakland.
- The Intertwine, a regional system of parks, natural areas and trails, was launched with the support of business leaders and parks directors from districts and municipalities in the region.

The Portland metro region's history of caring for natural habitat values gives it the capacity to do more to strengthen the ecological benefits of a regional program.
– Linda Craig

Recommendation

Develop The Intertwine in ways that will encourage the ecological values of the region in addition to recreational and transportation values.

Closing remarks

From its beginning, the oversight committee has had the ability to view the Natural Area Program from a variety of perspectives – from a 30,000-foot broad view to a 3-foot close-up – depending on what we feel is necessary. We have reviewed large-scale overall objectives, as well as had lively dialogues with Metro program managers about specific performance measures.

We do not just review reports and ask obligatory questions. Our inquiries and observations are based upon a level of engagement with staff and the program itself that is truly unique. Our meetings take place during three-hour time blocks that allow the type of in-depth involvement that the voters deserve.

With this high level of interaction, Metro listens, makes adjustments and improves. The way the committee functions, combined with the openness and receptiveness of Metro staff, results in a constant stream of small corrections that help the Natural Area Program stay on course.

The enthusiasm with which Metro staff greeted our suggestions was encouraging. They exhibited a genuine willingness to accept feedback and grow in order to generate an excellent outcome.
– Peter Krainock

How to learn more

We encourage you to learn more about Metro's Natural Areas Program and how you can be involved by visiting the Metro web site.

We also welcome your feedback about what you would like to hear from us next year. Are there specific areas of concern or processes you think we should focus on? Please contact us with any ideas, suggestions or questions.

Web site

www.oregonmetro.gov/naturalareas

E-mail

naturalareas@oregonmetro.gov

Telephone

503-797-1545

For ongoing information, subscribe to GreenScene, Metro's quarterly guide to great places and green living.

www.oregonmetro.gov/greenscene

Metro | *People places. Open spaces.*

Clean air and clean water do not stop at city limits or county lines. Neither does the need for jobs, a thriving economy and good transportation choices for people and businesses in our region. Voters have asked Metro to help with the challenges that cross those lines and affect the 25 cities and three counties in the Portland metropolitan area.

A regional approach simply makes sense when it comes to protecting open space, caring for parks, planning for the best use of land, managing garbage disposal and increasing recycling. Metro oversees world-class facilities such as the Oregon Zoo, which contributes to conservation and education, and the Oregon Convention Center, which benefits the region's economy.

Metro representatives

Metro Council President – David Bragdon

Metro Councilors – Rod Park, District 1; Carlotta Collette, District 2; Carl Hosticka, District 3; Kathryn Harrington, District 4; Rex Burkholder, District 5; Robert Liberty, District 6

Auditor – Suzanne Flynn

www.oregonmetro.gov

Metro

600 NE Grand Ave.
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METRO

Office of the Auditor

NATURAL AREAS AUDIT FOLLOW-UP

Natural Areas Program: Good progress made

Kristin Lieber

Senior Management Auditor

January 27, 2010

SUMMARY

The Metro Auditor's Office assessed Metro's implementation of recommendations from the **2007 audit "Natural Areas Program: Improved transparency recommended."** We found Metro has done a good job in establishing systems to make operations transparent and accountable. Recommendations from the audit have been implemented or are in process.

We performed this follow-up audit in accordance with generally accepted government auditing standards. Those standards require that we plan and perform the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for our findings and conclusions based on our audit objectives. We believe that the evidence obtained provides a reasonable basis for our findings and conclusions based on our audit objectives.

SUZANNE FLYNN

Metro Auditor

600 NE Grand Avenue

Portland, OR 97232

tel: 503-797-1892

fax: 503-797-1831

www.oregonmetro.gov/auditor

BACKGROUND

Three years have passed since voters approved the 2006 Natural Areas bond measure, providing \$227.4 million to acquire natural area land. In October 2007, the Auditor's Office assessed whether Metro was prepared to effectively manage land purchases. The Auditor issued a report "Natural Areas Program: Improved transparency recommended." The audit found that new performance measures would assist oversight and management of the Program, communication could be improved and lessons learned should be preserved to help improve operations.

SCOPE AND METHODOLOGY

We followed up on the audit's eight recommendations to gauge progress made since the report was issued. In addition, we looked at three underlying issues in the 2007 report that could be better assessed now that the Program had been operating for several years. These underlying issues were: 1) whether decision-making was transparent, 2) if the program was monitoring results, and 3) whether the Natural Areas Program Performance Oversight Committee was structured to be effective.

To accomplish this, we conducted interviews with management and surveyed oversight committee members. Program staff provided extensive documentation of their work to address the recommendations. We examined computerized data and conducted tests of data reliability. We reviewed management reports, closing memos, planning documents and the annual report of the Natural Areas Program Performance Oversight Committee published in 2008.

RESULTS

We found that the Natural Areas Program had implemented or was in the process of implementing the 2007 audit recommendations. We determined the Program was making appropriate progress toward establishing systems to ensure accountability and transparency. Steps taken by management to address recommendations are summarized below. We commend the efforts of the Natural Areas Program in responding to the audit.

PERFORMANCE MEASURES

The audit recommended creating a more complete system of performance measures. The Program made extensive improvements in this area. We found the performance measurement system was complete, balanced and useful. Specific improvements included:

- The Program added further credibility to its purchase decisions by evaluating new acquisitions against a set of pre-determined quantitative measures. This will help disarm potential criticism that measures or indicators were selectively chosen to justify decisions after the fact.
- The performance measurement system was complete and addressed the Program's major goals and objectives. It provided a balance of input, output, outcome and accountability measures. Data was collected consistently and could be summarized and analyzed.
- Data systems were expanded to capture additional performance information. The Program linked performance data to a geographic information system (GIS) to allow it to capture, store, analyze and present data linked to location.
- Progress was underway in estimating the projected future cost of ongoing operations to provide greater visibility of future expenditure needs.

In the 2007 report, we noted that the Program's goals can conflict with each other. For example, increasing public access to an area reduces its value for wildlife habitat. We found there was a sense that making acquisitions in some areas was more pressing than others, however, the relative importance between target areas was not documented. We recommended explicitly prioritizing between goals. Management elected not to implement this recommendation. External factors affected whether there was more or less activity in one area because purchases were made only from willing sellers. We accepted this reasoning. We believe the Program's new tools provided transparency regarding priorities and whether money was spent as intended.

COMMUNICATION

The audit recommended improved communication planning in order to provide more clarity and openness about activities. We found the Program was approaching communication more strategically and had implemented this recommendation by:

- creating communication plans with annual calendars, messages, and target audiences.
- allocating money in the budget for regular communication campaigns.
- evaluating the effectiveness of communication with the oversight committee.

We also recommended the Program evaluate public involvement with input from the Metro Committee of Citizen Involvement (MCCI). While the Program had not formally sought feedback from the MCCI since the 2007 audit, we found it had substantively met this recommendation. It presented the results of public involvement activities to the MCCI and sought feedback on communication and outreach strategies from the Natural Areas Program Performance Oversight Committee.

LESSONS LEARNED

The 2007 audit recommended developing a strategy to capture important information from employees and store lessons learned. The Program implemented this recommendation. Improvements included:

- Staff developed several documents summarizing lessons learned from the capital grant program, land acquisition process, communication, and administration.
- Negotiators maintained ongoing records of observations about the purchasing and negotiation process.
- Staff evaluated and documented what worked well and what did not work during the early stages of the Program.

OVERSIGHT COMMITTEE

While we made no recommendations in the 2007 audit regarding the oversight committee, we assessed the committee's structure during this follow-up audit because of its important role in accountability and transparency. We conducted a survey of committee members. According to the responses, committee members agreed or strongly agreed the committee had the following:

- a clear delineation of responsibilities,
- access to relevant information,
- sufficient resources,
- adequate size,
- and appropriate member expertise.

AREAS NEEDING FURTHER ATTENTION

With the acquisition of thousands of acres of additional land, the cost of maintaining and restoring this property will increase. The Program had begun to gather data necessary to estimate this cost. It should continue work to provide greater clarity of likely projected costs.

Isolating and estimating the long term impact of the Program remains a challenging endeavor. We encourage the Program to develop performance measures to determine if acquisition and restoration activities are having the anticipated results.

While the Program was being more strategic about communication, we found it continued to report primarily about single purchases

rather than provide a region-wide picture. Management stated it intends to communicate about the impact of the larger program in the coming year, and we encourage moving in this direction.

Staff entered performance data manually into several different computer-based systems. We conducted limited testing of data reliability and found improvements could be made to ensure the data is accurate and consistent. The Program was in the process of hiring a contractor to improve data storage, management and reporting. We encourage continuing to move forward on efforts to integrate data management to eliminate unnecessary duplication of data entry and improve data reliability.

STATUS OF METRO AUDITOR RECOMMENDATIONS

2007 Recommendations	Status
Develop performance measures in each Program goal area (conservation, water quality and public access) and accountability measures, and collect data on these measures on a regular basis.	<i>IMPLEMENTED</i>
Include as accountability measures the future cost of operations and maintenance, monitor easements and staffing subsidized by the general fund.	<i>IN PROCESS</i> The Program was developing a system to estimate future operating costs, but this system was not complete. It tracked staffing. It had developed capacity to monitor easements and had recently purchased its first one.
Expand the property acquisition database to include consistent measures of the quality of acquired properties.	<i>IMPLEMENTED</i>
Develop a process to capture consistent information in closing memos and the Acquisition Summary Form.	<i>IMPLEMENTED</i>
Prioritize Program goals and link reports to these goals.	<i>IMPLEMENTED</i> Reports were linked to goals, but the Program elected not to prioritize between goals. We accept the reasoning behind the decision.
Evaluate public involvement in the Program with input from the Metro Committee for Citizen Involvement.	<i>IMPLEMENTED</i> The Program evaluated involvement with the oversight committee rather than MCCI. We find the Program has met the intent of the recommendation.
<p>The Program should develop a communication strategy that considers:</p> <ul style="list-style-type: none"> • periodic, such as annual, accountability and progress reporting; • opportunities to use partner communication vehicles for efficiencies; • ways to improve the Program website to make it a better resource for partners; • alignment between key messages and Program goals; • standards and instructions for signing property; • communication to internal and external audiences about ethics; • estimated resources required to carry out the communication strategy; • periodic evaluation of whether the strategy is reaching its target audiences and meeting its communication goals. 	<i>IMPLEMENTED</i>
The Program should develop a more formal knowledge management strategy to capture and document information held by key staff members, including lessons learned from the 1995 Program.	<i>IMPLEMENTED</i>



Metro | *People places. Open spaces.*

January 7, 2010

Suzanne Flynn
Metro Auditor
600 NE Grand Avenue
Portland, OR 97232

Dear Auditor Flynn:

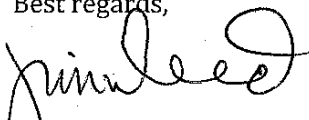
We have reviewed the Natural Areas Audit Follow-up report. Thank you for your acknowledgement of staff's efforts to implement the recommendations of the Auditor and of the Natural Area Citizens Oversight Committee. Both outside perspectives have challenged program staff to develop systems and procedures to ensure program transparency and accountability, and the recognition of those systems in this report is appreciated.

The one recommendation from your office's prior report that you are not showing as implemented is accounting for the future cost of operations and maintenance. This is a challenging task with many variables, but as mentioned in the report, we are making progress on a system to track the information we need to make cost projections. The availability of this information to provide decision-makers with background for budget and long term planning purposes is critical, and we are making every effort to improve our methods and ensure a consistent, documented approach for the future. This is critical to fulfilling the promises made to the voters when they voted to tax themselves for water quality and wildlife habitat improvements.

Program staff will continue to work diligently to maintain these systems, and to adjust and improve them when we see the opportunity to do so. Many of these recommendations are dynamic in the sense that as we learn more about our work, we identify better ways to manage this information.

We thank you and your staff for your thoughtful and professional look at our program and systems.

Best regards,


Jim Desmond
Director
Sustainability Center

cc: Michael Jordan, Chief Operating Officer
Scott Robinson, Deputy Chief Operating Officer
Dan Cooper, Metro Attorney
Kathleen Brennan-Hunter, Natural Areas Program Director

Metro's Natural Areas Program progress report

In November 2006, voters asked the Metro Council to safeguard water quality, protect fish and wildlife habitat and ensure access to nature for future generations.

Working with local partners, Metro's Natural Areas Program has already protected nearly 2,500 acres of land across the region.



The \$227.4 million bond measure protects natural areas, rivers and streams, helping manage growth and maintain quality of life throughout the greater Portland region.

Metro's Natural Areas Program is designed to work at the regional, local and neighborhood levels.

Counting our successes

Acres protected with regional funds: 2,356

Portion of 4,000-acre goal fulfilled: 59 percent

Number of transactions: 49

Target areas where land has been protected: 17

Dollars spent on regional land acquisition: \$53 million

Rivers and streams protected: More than 11 miles

Smallest acquisition: .38 acres (Johnson Creek area)

Biggest acquisition: 1,143 acres (Chehalem Ridgetop to Refuge area)

Acres protected by local governments: 139

Dollars spent on local acquisitions: \$12.4 million

Regional natural areas

\$168.4 million in bond funds available

When voters approved the bond measure, they signed off on 27 target areas to protect. The Metro Council spent most of 2007 crafting a strategy for each area, with lots of input from natural resource and land use experts, scientists, local land managers and residents. Nearly 1,000 people completed questionnaires, ranking priorities, suggesting partnerships and offering ideas to stretch the public's investment. Now, each target area has a map and detailed goals – all available online at www.oregonmetro.gov/naturalareas.

At the regional scale, Metro's Natural Areas Program has already protected nearly 2,400 acres of land in 17 target areas. Among the acquisitions:

- A rare type of wetland called a "fen" was the prime attraction on 13 acres in the Willamette Narrows area near West Linn. A fen, which features a shallow lake with a floating bed of peat moss, provides habitat for very important – and very unusual – plants. Metro acquired part of this fen in 1998 with funds from a previous bond measure, and completed the job in 2009.





- Metro continued preserving Council Creek with the purchase of 7 acres near Cornelius, west of Susbauer Road. Plans are under way to restore a 670-foot section of creek and improve a small wetland and upland forest. Metro crews share the property with beaver, river otter, deer and ducks.
- An 1,800-acre swath of land near the Sandy River is now in public ownership, thanks to Metro's purchase of a 42-acre gap along Gordon Creek. The new property, which provides spawning areas for threatened Sandy River fall Chinook and winter steelhead, is close to Metro's Oxbow Regional Park, other Metro natural areas and Bureau of Land Management property.

Get out and go

Metro leads many nature hikes and sneak preview tours at regional natural areas. For the latest offerings, go to

www.oregonmetro.gov/greenscene



Natural Areas Program reaches milestone with biggest-ever acquisition

Imagine standing on top of Chehalem Ridge, looking out over Tualatin Valley farmland and five Cascade mountain peaks: Rainier, St. Helens, Adams, Hood and Jefferson.

You might spot deer tracks, beaver carvings or an uncommon oak-madrone woodland. Explore the starting point for a network of streams flowing to the Tualatin River, nestled in a landscape of young Douglas fir trees. With generations of careful management, they'll mature into old-growth forests that support diverse wildlife and clean water.

Now you have an inkling of what it's like to experience Metro's newest natural area: a 1,143-acre expanse of forestland south of Forest Grove. Metro began 2010 by purchasing Chehalem Ridge Natural Area, the largest acquisition in the history of the region's two voter-approved bond measures.

The new natural area is one of the metropolitan area's biggest remaining swaths of undeveloped forest. At about the size of Oxbow Regional Park, this land is positioned to protect water quality and wildlife habitat in the Tualatin River Basin and serve as a scenic and recreational resource for the region.

"This acquisition nearly doubles the amount of land the Metro Council has protected with the latest bond measure, but Chehalem Ridge is much more than a number," Metro Council President David Bragdon said. "It's also a milestone in terms of scenery, restoration potential and partnerships."

Protecting Chehalem Ridge was a team effort. The Trust for Public Land negotiated a \$6.1 million purchase from Stimson Lumber Co. and immediately sold the property to Metro for the same price.





At 1,143 acres, Chehalem Ridge Natural Area offers views of five Cascade peaks – including Mount Hood.



Metro Council President David Bragdon tours Chehalem Ridge Natural Area.

Because of its scale, Chehalem Ridge Natural Area can make a big impact on the Metro Council’s goals for land acquisition in this area: enhancing wildlife habitat and water quality. Restoration work on this property has the potential to affect the health of the Tualatin River.

“It’s home to my drinking water, and that of 200,000 of my friends here in western Washington County,” district 4 Metro

“This acquisition nearly doubles the amount of land the Metro Council has protected with the latest bond measure, but Chehalem Ridge is much more than a number.” – Metro Council President David Bragdon



Councilor Kathryn Harrington told the Hillsboro Argus, one of many media outlets that featured the news about Chehalem Ridge.

Metro also hopes to provide more public access to nature. An existing gravel and dirt road network at Chehalem Ridge Natural Area could form the basis for a future trail system.

The science staff will spend a year or so getting to know the property before Metro makes long-term decisions about public use. The Natural Areas Program will develop a plan to guide forest management and habitat restoration, while organizing guided hikes and other short-term opportunities for the public to see Chehalem Ridge.

Follow the evolution of this regional gem through photos, videos, maps and tour announcements at www.oregonmetro.gov/chehalemridge.



Cooper Mountain Nature Park offers trails, wildflowers and vistas.



Cooper Mountain visitors get close-up view of nature – and a legacy

Visitors traverse forest, prairie and oak woodlands at the new Cooper Mountain Nature Park, which opened in the summer of 2009.

Some may not realize they're also exploring another type of landscape: the legacy of two voter-approved bond measures to acquire and improve natural areas.

Metro used the region's 1995 bond measure to buy this 231-acre natural area at the southern edge of Beaverton, overlooking the Tualatin River Valley. Funds from the 2006 bond measure – along with an Oregon State Parks grant – transformed Cooper Mountain into the recreation destination it is today.

Three-and-a-half miles of gravel trails meander through the park, rewarding hikers with close-up views of Oregon white oaks and wildflowers and, once in a while, rare animals such as the Northern red-legged frog and the Western gray squirrel. Viewpoints offer panoramas of the Tualatin Valley and the Chehalem Mountains.

The Tualatin Hills Park & Recreation District manages Cooper Mountain, including a Nature House for environmental education programs and a demonstration garden meant to inspire your own plot.

Visiting Cooper Mountain

18892 SW Kemmer Road, Beaverton

From Highway 217: Take the Scholls Ferry Road exit and head west on Scholls Ferry, past Murray Boulevard. At Southwest 175th Avenue, turn right and go north, uphill, about 1.8 miles. Turn left onto Kemmer Road; the park entrance is on the south side.

From Southwest Farmington Road (Highway 10): Go south on 185th Avenue, which becomes Gassner Road. Turn left on 190th Avenue and left on Kemmer Road.

Parking: Spaces are extremely limited. Please carpool, walk or bike!

More information: www.oregonmetro.gov/coopermountain





(Above) Metro has used 1995 and 2006 bond measures to purchase a total of 158 acres at Oregon's City's Canemah Bluff, which features the Willamette River views and conifer forests shown here – along with ash bottomlands, Pacific madrone trees and rare Oregon white oak woodlands.



(Above) Graham Oaks Nature Park is scheduled to open in September 2010, allowing visitors from Wilsonville and across the region to explore this re-created oak woodland. The 250-acre natural area has been a long-term project, drawing from natural area bond measures approved by voters in 1995 and 2006.



(Above) This 88-acre natural area along the Clackamas River bluffs features old-growth forest, a network of small caves and cliffs and, on a clear day, views of Mount Hood. Metro staff explored the property shortly after its purchase in fall 2009.

(Left) A tour group explores an 18-acre natural area along Deep Creek in Clackamas County, which Metro purchased in October 2009. This scenic stretch of forest sits along the developing Cazadero Trail.



Local projects in your community

\$44 million in bond funds

The Natural Areas Program allows flexibility for each community to meet its own needs, and offers improved access to nature in neighborhoods across the region. Cities, counties and park providers in the metropolitan area are using their bond funds to protect natural areas or add park land, restore fish and wildlife habitat, improve public access to nature, design and construct trails and enhance environmental education.

Of more than 100 projects planned throughout the region, more than three dozen have been completed. Here's a sampling of the success stories.

The **City of Tualatin** purchased nearly 3.5 acres along the Tualatin River Greenway, immediately west of Jurgens Park. This acquisition includes 235 feet along the river, which is home to an abundance of fish and wildlife, including steelhead and salmon, Western painted turtles and Northern red-legged frogs. The new property will be integrated into Jurgens Park, a popular gathering spot in northwest Tualatin.

The **City of Portland** acquired three small properties that expand existing natural areas: Forest Park in Northwest Portland, Buttes Natural Area in outer Southeast Portland and Woods Memorial Natural Area in Southwest Portland. These additions – less than 4 acres altogether – will provide vital buffers, protecting the natural areas from surrounding development.

The **Tualatin Hills Park & Recreation District** and the **City of Beaverton** pooled their bond measure funds to buy an 8.5-acre woodland in southwest Beaverton as a natural area and future park. Located between the Murray Ridge and Sterling Park subdivisions, the property will serve a residential area that needs additional park land.



Western painted turtle



The City of Tualatin used funds from Metro's natural areas bond measure to expand Jurgens Park, along the Tualatin River Greenway.

Fairview reinvents neglected natural area

These days, neighbors walk their dogs or push strollers through the winding path at Fairview Woods. They stop to gaze at Douglas fir trees, Western red cedar, vine maple and other native plants. If it weren't for the faint whir of traffic, you'd never guess this 8-acre nature park was nestled in a residential neighborhood close to Interstate 84.

Fairview Woods wasn't always so serene. A few years ago, ivy and blackberry had invaded the park. Graffiti tagged the trees, and you could barely see down the narrow trails. Although nobody was hurt, a shotgun incident heightened a growing sense of fear.

The City of Fairview teamed up with neighbors to transform Fairview Woods – and they turned to Metro's Natural Areas Program for funding.

"The city is very grateful for that money being available," said John Gessner, Fairview's community development director. "It came at the right time for this park."

With \$99,000 in bond money, the city widened trails and made them wheelchair-accessible. A goat herd helped clear non-native plants, and work crews replaced them with species that belong in a Northwest forest.

The city cooperated with the Housing Authority of Portland, which owns an apartment complex next to Fairview Woods and used to own the park before donating pieces to the city in 1995 and 2007.

Steve Kaufman, a longtime neighbor of Fairview Woods and chairman of the city's parks committee, didn't walk through the park very often during the makeover. He wanted to be surprised by the before-and-after.



Metro Councilor Rod Park explores Fairview Woods, which was spruced up with wider trails, more native plants and a renewed sense of safety.

Since the November 2009 reopening, Kaufman says, Fairview Woods has once again become a popular getaway for neighbors.

"The changes are phenomenal," Kaufman says. "It's a much nicer place to be."

Fairview Woods is a success story in its own right, said Metro Councilor Rod Park, who represents the eastern part of the Portland area in District 1. But it can inspire projects in other communities, too.

"We hope what we see here will be repeated across the region as people come out and find an area they really like," said Park. "They want to enhance it, and they really take ownership in their neighborhoods."



"The changes are phenomenal. It's a much nicer place to be." – Steve Kaufman, Fairview Woods neighbor



Metro Councilor Robert Liberty and Mary Rose Navarro of Metro's Natural Areas Program help out at the kickoff for Friends of Trees' project along Interstate 205.



Nature in Neighborhoods

\$15 million in bond funds

The bond measure set aside grant money to engage schools, community groups, nonprofits, park providers and others in projects that connect neighborhoods with nature. As these local projects are carried out, the program preserves and enhances the natural features that make each community special.

About \$1.4 million has been awarded in capital grants, with more planned for March 2010. Among the most recent batch of recipients:

- Metro helped foot the bill for a 2-acre expansion of Nadaka Nature Park in

Gresham's East Wilkes neighborhood. The new addition sits along Northeast Glisan Street, offering greater visibility and better public access for this sometimes-overlooked community asset.

- A vacant lot next to Humboldt School in North Portland is being transformed into a learning garden for students and nearby residents. Plans call for incorporating native plants and reusing the school's stormwater.
- Metro helped purchase 14 acres of significant Oregon white oak savanna in West Linn to protect, restore and manage as a natural area. Visible from Interstate 205, this property offers views over the Willamette River to Canemah Bluff in Oregon City.
- Friends of Trees is teaming up with the Oregon Department of Transportation to plant 1,300 native trees and 16,000 native shrubs on the bike and pedestrian path along Interstate 205. Another project partner, Verde, will create jobs in the nursery industry and expand environmental education and work training opportunities to underserved communities of color.

Visit www.oregonmetro.gov/naturalareas for more information about Metro's Natural Areas Program and how your tax dollars are being used to protect water quality and bring more nature into neighborhoods.

Photography by

C. Bruce Forster, Ed McVicker, NarrativeLab, Inc., Chijo Takeda, City of Tualatin, Metro staff and partners.



Metro natural areas are part of The Intertwine, our connected network of parks, trails and natural areas in the Portland, Oregon and Vancouver, Washington region. To learn how you can help us plan, protect and promote The Intertwine, visit www.theintertwine.org

Metro | *People places. Open spaces.*

Clean air and clean water do not stop at city limits or county lines. Neither does the need for jobs, a thriving economy and good transportation choices for people and businesses in our region. Voters have asked Metro to help with the challenges that cross those lines and affect the 25 cities and three counties in the Portland metropolitan area.

A regional approach simply makes sense when it comes to protecting open space, caring for parks, planning for the best use of land, managing garbage disposal and increasing recycling. Metro oversees world-class facilities such as the Oregon Zoo, which contributes to conservation and education, and the Oregon Convention Center, which benefits the region's economy.

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Auditor – Suzanne Flynn

www.oregonmetro.gov

Metro

600 NE Grand Ave.
Portland, OR 97232-2736
503-797-1700

March 2010



To learn more about Nature in Neighborhoods capital grants, visit www.oregonmetro.gov/capitalgrants, call Mary Rose Navarro at 503-797-1781 or send e-mail to maryrose.navarro@oregonmetro.gov.

Metro Nature in Neighborhoods capital grants

As the Portland metropolitan area expands, there's more and more pressure to preserve water quality and fish and wildlife habitat. Growth sparks some important questions: How can the region balance development and conservation? What are the best ways to improve ecology in urban areas? How can existing neighborhoods nurture the natural world? The Metro Council is seeking creative answers through the Nature in Neighborhoods capital grants program.

These grants are funded by Metro's natural areas bond measure, which was approved by voters in 2006. Their \$227 million investment protects water quality, wildlife habitat and access to nature for future generations. The Metro Council designed the program to work at every level – from large, regional natural areas to the community-based projects funded by capital grants.

How does the capital grants program work?

- Neighborhoods, community groups, nonprofit organizations, schools, cities, counties and public park providers are invited to apply.
- Projects must purchase land or make improvements to real property that result in a capital asset with a life of at least 20 years and a total value of at least \$50,000.
- The applicant must match grant funds with outside funding or in-kind services equivalent to twice the grant request.
- Metro staff is available to help shape a project, connect you to resources and offer technical support. The earlier you call, the better the assistance available. Throughout the application and review process, applicants will receive comments and suggestions to help shape the strongest possible project.
- The first step is a letter of inquiry, which helps Metro staff understand how a project matches the grant program's key criteria. Metro staff review letters and, when appropriate, invite full applications.
- Staff screen applications, conduct site visits and present proposals to the Metro Council's grant review committee. The committee recommends awards at least once a year to the Metro Council, which makes all final grant awards.

Twelve capital grant projects that invite nature in

Read on to learn about 12 past and current projects funded by Nature in Neighborhoods capital grants and gain inspiration from residents working to re-green and restore nature in their neighborhoods.



2008 AWARDS



Crystal Springs Creek restoration



Conservation Corner



Nadaka Nature Park

Crystal Springs Creek restoration and nature play at Westmoreland Park

Recipient: Portland Parks & Recreation

Partners: Johnson Creek Watershed Council, SMILE (Sellwood-Moreland Improvement League)

Grant amount: \$150,000

Total project cost: \$869,000

This project restores nearly half a mile of Crystal Springs Creek, an important tributary to Johnson Creek. The concrete channel and playground equipment are being removed from the floodplain area, and the banks are being replanted with native trees and shrubs. The grant also provides funding to design and construct a new play area, allowing children to improve sensory awareness and discover the natural environment.

Conservation Corner: North Portland nature and discovery garden

Recipient: East Multnomah Soil and Water Conservation District

Partner: Humboldt Neighborhood Association

Grant amount: \$99,500

Total project cost: \$1.7 million

A historic property in North Portland's Humboldt neighborhood is being transformed into an outdoor classroom and living laboratory. This project enhances residents' appreciation of how natural features can be incorporated into the landscape and gives people new ideas to try at home. The demonstration garden will include nature-friendly designs for capturing and treating rainwater on site, including a rain garden, cistern, porous pavement and creative art for a disconnected downspout.

Hawthorne Grove Park acquisition and development

Recipient: Clackamas County Development Agency

Partners: Developer Nick Stearns, Clackamas County Land Trust, North Clackamas Parks and Recreation District, Clackamas County Soil and Water Conservation District

Grant amount: \$140,000

Total project cost: \$430,000

A park-deficient, low-income community with permanent affordable housing gets a small neighborhood park, thanks to this project. Active participation from diverse partners – including developers, residents and an affordable housing provider – will keep the community directly involved in caring for their park in the future.

2009 AWARDS

Nadaka Nature Park acquisition

Recipient: City of Gresham

Partners: East Multnomah Soil and Water Conservation District, The Trust for Public Land, East Wilkes Neighborhood Association, Audubon Society of Portland, St. Aidan's Episcopal Church

Grant amount: \$220,000

Total project cost: \$660,000

Metro helped foot the bill for a two-acre expansion of Nadaka Nature Park in Gresham's East Wilkes neighborhood. The new addition sits along Northeast Glisan Street, offering greater visibility and public access for this hard-to-find community asset. The City of Gresham will develop a master plan and natural resource management plan for the entire park, which is now 12 acres, improving ecological function and enhancing native wildlife habitat. Participation from diverse partners – including the East Wilkes Neighborhood Association and members of nearby St. Aidan's Episcopal Church – will engage the community for years to come.

White oak savanna acquisition

Recipient: City of West Linn

Partners: Oregon Parks and Recreation Department, Tanner Basin Neighborhood Association, The Trust for Public Land

Grant amount: \$334,000

Total project cost: \$1.8 million

By contributing one-third of the purchase price for 14 acres of significant Oregon white oak savanna, Metro helped protect this West Linn property as a natural area. Visible from Interstate 205, the acquisition preserves a rare habitat type – and views for commuters traveling the busy freeway. A new soft-surface trail will allow public access to this unique habitat, showcasing the remarkable vistas over the Willamette River to Canemah Bluff in Oregon City.

Humboldt learning garden

Recipient: Lower Columbia River Estuary Partnership

Partners: Portland Public Schools, Housing Authority of Portland, Humbolt Neighborhood Association, Lewis & Clark College

Grant amount: \$33,686

Total project cost: \$99,000

This project transforms a vacant lot next to Humboldt School into a learning garden accessible to students and residents of Humboldt Garden, a low-income housing development across the street. Metro's funding helps collect and re-use the school's stormwater and incorporate native plants throughout the garden. The project provides access to nature in a park-deficient, urban neighborhood with few opportunities to add new parks or open space.

Greening the Interstate 205 corridor

Recipient: Friends of Trees

Partners: Oregon Department of Transportation, Verde, community groups including Montavilla and Lents neighborhood associations

Grant program funding: \$415,436

Total project cost: \$1.2 million

A unique partnership will demonstrate how changing the landscape is a cost-effective way to improve environment, health and scenery along a freeway. Over three years, this project will plant 1,300 native trees and 16,000 native shrubs in the Interstate 205 right-of-way. Friends of Trees is engaging about 2,400 volunteers, giving 9,600 hours of time. Project partner Verde is creating jobs in the nursery industry and expanding environmental education to underserved communities of color. Additionally, this project will improve the freeway's bike and pedestrian path and demonstrate the value of planting native trees and shrubs along key transportation corridors. The Oregon Department of Transportation will use this project to inform a statewide discussion about updating the agency's landscaping standards.

2010 AWARDS

Re-greening Park Avenue park and ride

Recipient: TriMet, Urban Green

Partners: North Clackamas Parks and Recreation District, Oak Lodge Sanitary District, North Clackamas Urban Watershed Council

Grant amount: \$349,305

Total project cost: \$1 million

Finding inspiration in Metro's Integrating Habitats design competition, this project will create the region's first sustainable, habitat-friendly light rail station and park and ride. When TriMet's new orange line zips through Oak Grove in 2015, commuters will experience a re-created riparian forest, a natural stormwater treatment system and many other green features at the Park Avenue stop along Southeast McLoughlin Boulevard. Agencies and community groups are collaborating to showcase development that balances design excellence, ecological stewardship and economic enterprise. Project partners hope to restore the Courtney and Kellogg creek basins and promote low-impact development throughout the McLoughlin corridor – showing community members, Trolley Trail users and thousands of MAX riders how to restore ecosystems in a built environment.

Trillium Creek restoration

Recipient: City of West Linn

Partners: Mary S. Young Volunteers, Willamette Riverkeepers, Oregon Department of Fish and Wildlife, Harris Stream Service, Robinwood Neighborhood Association

Grant amount: \$55,330

Total project cost: \$179,000

Students, volunteers and other community members will come together to restore a degraded stream system at Mary S. Young State Park, creating a healthy riparian corridor. Severe bank erosion has compromised the 1,045-foot section of Trillium Creek that will be transformed. The project will restore floodplain connectivity and enhance the rich diversity of native trees, shrubs and other plants along the riparian corridor and adjacent wetlands in this West Linn park.



White oak savanna acquisition



Humboldt learning garden



Trillium Creek restoration

Collaborate. Innovate. Inspire.

The Nature in Neighborhoods capital grants program funds projects that preserve or enhance natural features and their ecological functions on public lands in neighborhoods. They help ensure that every community enjoys clean water and nature as an element of its character and livability.

Schools, neighborhood associations, community groups and other nonprofit organizations, cities, counties and public park providers are encouraged to apply.



Baltimore Woods connectivity corridor



Summer Creek natural area acquisition

The Metro Council's voter-approved 2006 Natural Areas Program

funds land acquisition and capital improvements that protect water quality and fish and wildlife habitat, enhance trails and wildlife corridors and provide greater connections to nature in neighborhoods throughout the Portland metropolitan area. For more information about this program or other habitat restoration projects at Metro's natural areas, visit www.oregonmetro.gov/naturalareas.

2010 AWARDS

Baltimore Woods connectivity corridor

Recipient: City of Portland Bureau of Environmental Services, Three Rivers Land Conservancy

Partners: Portland Parks & Recreation, Friends of Baltimore Woods, Audubon Society of Portland, SOLV, Port of Portland

Grant amount: \$158,000

Total project cost: \$475,000

Metro funding will help purchase four parcels, totaling one acre, within the Baltimore Woods corridor in North Portland. This acquisition will protect rare native oak trees and enhance the nature experience for bicyclists, walkers and joggers who will someday use this section of the Willamette River Greenway Trail envisioned along the adjacent street. These parcels are part of a larger natural area corridor connecting Cathedral and Pier parks. Active participation from city agencies, land trusts, non-profit organizations and the Friends of Baltimore Woods will involve the community in restoration and long-term stewardship.

Crystal Springs partnership

Recipient: City of Portland Bureau of Environmental Services

Partners: Johnson Creek Watershed Council, Friends of Crystal Springs, Portland Parks & Recreation, Reed College.

Grant amount: \$311,480

Total project cost: \$968,000

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Crystal Springs has all the characteristics of an excellent salmon stream: It's entirely spring-fed, which eliminates pollutants from urban runoff. Relatively consistent year-round flow and low temperatures attract some of Portland's most threatened fish species. This project helps realize the stream's potential by removing a culvert that blocks juvenile fish passage and restoring the floodplain and riparian habitat along 350 feet of the creek. Conservation easements or acquisition on three additional properties will allow future floodplain restoration.

Summer Creek natural area acquisition

Recipient: City of Tigard

Partners: The Trust for Public Land, Tualatin RiverKeepers, Tualatin Watershed Council, Fans of Fanno Creek, Washington County, Clean Water Services.

Grant amount: \$1 million

Total project cost: \$5.4 million

Metro will contribute to the acquisition of 43 acres of wetlands and mature forests at the confluence of Summer and Fanno creeks. The property is a high-profile natural area – the best remaining unprotected land in Tigard and, soon, the city's second largest park. The site has functioned as an outdoor lab for students at Fowler Middle School. With the help of several community partners, this project will expand environmental education programs to students throughout Washington County.

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF AMENDING THE)	RESOLUTION NO. 10-4122
NATURAL AREAS IMPLEMENTATION)	
WORK PLAN TO AUTHORIZE THE CHIEF)	Introduced by Chief Operating Officer Michael
OPERATING OFFICER TO MORE)	J. Jordan, with the concurrence of Council
EFFICIENTLY ACQUIRE AND ASSIGN)	President David Bragdon
TRAIL EASEMENTS.)	

WHEREAS, in November 2006 regional voters approved a \$227.4 million Natural Areas Bond Measure (“2006 Natural Areas Bond Measure”); and

WHEREAS, several of the target areas identified in the 2006 Natural Areas Bond Measure are regional trails in which the goal is to complete property acquisitions sufficient to allow for the construction of bicycle and pedestrian trails and, in most instances, the property interest needed to achieve such goal is the acquisition of a trail easement; and

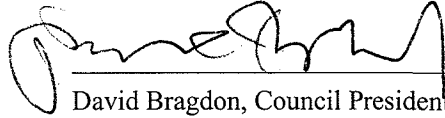
WHEREAS, in order to ensure that such trail projects will ultimately qualify for federal transportation funding for construction, such acquisitions must comply with federal property acquisition rules, administered by the Oregon Department of Transportation; and

WHEREAS, on March 1, 2007, the Metro Council adopted Resolution No. 07-3766A “Authorizing the Chief Operating Officer to Purchase property with Accepted Acquisition Guidelines as Outlined in the Natural Areas Implementation Work Plan” which included acquisition parameters for a pre-approved set of criteria under which the Chief Operating Officer and his/her designees are authorized to negotiate and complete land acquisition transactions (the “Natural Areas Implementation Work Plan”); and

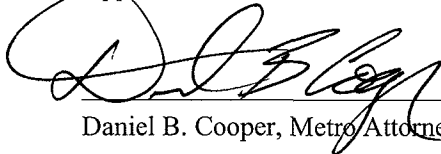
WHEREAS, in the process of executing the Work Plan in the trail target areas, staff have identified various circumstances in which the acquisition of trail easements, or in some instances fee title of trail properties, require different considerations than the standard acquisition practices as put forth in the Natural Areas Implementation Work Plan; now, therefore

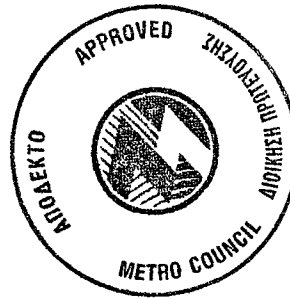
BE IT RESOLVED that the Metro Council hereby authorizes the Chief Operating Officer to acquire trail property interests subject to the Acquisition Parameters and Due Diligence Guidelines for Trail Easement Properties, attached hereto as "Exhibit A," and hereby incorporated by reference.

ADOPTED by the Metro Council this 4TH day of FEBRUARY 2008¹⁰.


David Bragdon, Council President

Approved as to Form:


Daniel B. Cooper, Metro Attorney



TRAIL EASEMENT ACQUISITION PARAMETERS

Definition:

"*Trail Easement Acquisition Parameters*" are the Metro Council-approved criteria and conditions under which the Chief Operating Officer and his/her designees are authorized to negotiate and complete Trail Easement Property acquisition transactions without further Council review and approval. The Chief Operating Officer and his/her designees may complete a trail easement acquisition transaction that does not meet all of the following acquisition parameters only with specific Council review and approval. A "*Trail Easement*" acquisition in this work plan refers also to acquisition of fee property interests when acquired for the main purpose of establishing a trail on the property.

Rationale:

The creation of pre-approved *Trail Easement Property Acquisition Parameters* will permit the agency to deal with willing sellers/grantors in an effective and efficient manner and allow the Metro Council to focus on policy level issues.

Intent:

Metro intends to pay no more than market value for property, it being acknowledged, however, that the Metro area real estate market is dynamic and the process of identifying market value is not exact. Metro's acquisition process should provide flexibility to achieve the goals of the Natural Area Bond Measure and to reflect the actual market conditions affecting the market value of properties targeted for natural areas acquisition. With respect to Trail Easement Property, market value does not always compensate landowners for certain impacts of trail development on their property that are difficult to quantify. These potential concerns are often related to security, privacy and costs related to owner attorney's review and advice. Their concerns provide barriers and objections to granting easements or selling suitable Trail Easement Property to Metro.

Acquisition of trail easements, in most cases will be governed by Federal Acquisition Guidelines as administered by the Oregon Department of Transportation. To address landowners' concerns about acquisition impacts related to security, privacy and costs related to owner attorney's review and advice, these guidelines provide the opportunity for offering greater compensation than the approved amount as determined by the property appraisal ("Administrative Settlements"). Following the Federal Acquisition Guidelines process assures that the governing body holding Trail Easement Property is eligible for future federal funding to assist or finance local or regional trail construction. For justified cases, Metro's Trail Easement Acquisition process may incorporate the option to offer Administrative Settlements in order to provide flexibility to achieve the goals of the Natural Areas Bond Measure.

Trail Easement Acquisition Parameters:

The Metro Council authorizes the Chief Operating Officer and his/her designees to negotiate and close Trail Easement Property transactions related to the 2006 Natural Areas Bond Measure provided all of the following criteria/conditions are met:

- The landowner is a willing seller/grantor.
- The tax lot is identified on a Council-adopted target area "confidential refinement map."
- The Real Estate Negotiator and a planning team representative have inspected the easement area, they and the Natural Areas Program Director have approved the purchase, and an acknowledgement of such visits and approvals has been completed.

- The negotiated purchase price for the easement is either:
 1. Equal to the fair market value as established by the appraisal and appraisal review processes described below (note that Metro will actively solicit donations and bargain sales); or
 2. Not more than 25% or \$20,000, whichever is greater, above such fair market value and the Natural Areas Program Director has authorized acquisition of the trail easement at such price after finding that acquisition of the easement above the initially offered purchase price is in the public interest. In order to conclude that such a purchase is in the public interest, the Program Director must conclude and document that:
 - The seller/grantor has rejected the fair market value as established by the appraisal and appraisal review processes described below and has provided a reasonable basis for the additional compensation;
 - The failure to acquire the easement will significantly compromise Metro's ability to achieve the goals described in the applicable adopted Refinement Plan for that target area. Staff will document the total compensation to the property owner including, but not limited to, future design and construction consideration such as landscaping, fencing, lighting or signage; and
 - The purchase will not reduce the amount of funds available to purchase other critical, high priority target properties nor will it compromise Metro's ability to achieve the goals described in the applicable adopted Refinement Plan for that target area.

- **Appraisal**

An independent certified appraiser has completed an appraisal of the easement area that states a conclusion of the fair market value of the property. The appraisal must generally comply with the Oregon Department of Transportation's appraisal guidelines. The appraiser shall state in the appraisal any assumptions that he/she relied upon to determine the easement's fair market value; however, the appraisal shall not be based upon any "extraordinary assumptions" made by the appraiser that materially affect the easement's fair market value.

- **Appraisal Review**

An independent certified appraiser has completed a review of the appraisal in accordance with the Uniform Standards of Professional Appraisal Practice ("USPAP") and general appraisal standards. If the review appraiser determines that the appraisal does not meet USPAP or other general appraisal standards, the review appraiser, after consultation with and at the direction of the Office of the Metro Attorney, may either (a) work with the appraiser to correct the deficiencies, (b) order a second appraisal to be reviewed in the manner set forth herein, or (c) make a final determination of the value for the property.

- *"Trail Easement Due Diligence"* has been completed in conformance with the *due diligence* section below and no unusual circumstances have been found to exist.

Notices and Reports to Council Regarding Completed Transactions

The Natural Areas Program Director or his/her designees shall notify the Council promptly following the closing of any real estate transaction. The Chief Operating Officer or his/her designees shall prepare and present to the Council quarterly updates summarizing acquisition activity distinguished by target area.

TRAIL EASEMENT DUE DILIGENCE GUIDELINES

Definition:

"*Trail Easement Due Diligence*" is the systematic inspection of the legal title and physical condition of an easement area before the easement is purchased to assure protection of public investment in trail properties. *Trail Easement Due Diligence* should be conducted in advance of closing so that resolvable problems can be adequately addressed prior to closing. A "*Trail Easement*" acquisition in this work plan refers also to acquisition of fee property when acquired for the main purpose of establishing a trail on the property.

Components:

The primary areas of *Trail Easement Due Diligence* are described below. A more detailed list of items examined may be found in the Appendix under "Due Diligence and Closing Checklist." The Metro Attorney may amend the checklist as determined necessary and appropriate at his/her discretion.

The Due Diligence Team is comprised of the Real Estate Negotiator, Metro Attorney staff, and assigned planner for each property.

- **Meeting Federal Guidelines:** Each Trail Easement acquisition shall be evaluated to determine if future federal funding for design and construction is potentially possible. If federal funding is possible, in order to safeguard eligibility for this funding, Metro staff will adhere to the trail acquisition guidelines as required by the Oregon Department of Transportation, and updated from time to time to ensure compliance with the Uniform Relocation Assistance and Real Property Acquisition Act of 1970 (the "Uniform Act") and with Oregon law (ORS 35.510).
- **Appraisal:** An appraisal of the easement area must be completed to determine the easement's market value and provide other useful information about the property. The appraisal shall be in the format described in the previous section regarding *trail easement acquisition parameters* and shall be reviewed in the manner set forth therein.
- **Examination of Title:**
 1. Metro must satisfy itself that the seller/grantor has authority to sell the easement, that Metro understands what rights will be conveyed, that all parties necessary for the grant are involved, and that any rights that are not a part of the transaction will not defeat the purpose of the acquisition.
 2. *Trail Easement Due Diligence* requires the review and inspection of the title report and related documents, including the deed to the current owner, recorded easements and other encumbrances, water rights, access rights, taxes, liens, etc.
 3. Other documents that need to be inspected include unrecorded leases with existing tenants or farmers, management agreements, records pertaining to personal property included in the sale, surveys, and agreements the seller may have entered into that may not be of record.
- **Inspection of the Property:**
 1. Location of Boundaries. *Trail easement due diligence* requires the review of any existing survey of the property. Metro should also identify the boundaries of the easement area. If such boundary identification is not possible, a survey of the easement area will be conducted unless deemed unnecessary or uneconomical by the Due Diligence Team. Additionally, Metro must identify that both legal and physical access to the easement area exist and are usable. Legal and physical access by the public will be secured unless the nature of the property is such that access restrictions are acceptable for that property.
 2. Physical Inspection. Metro or its contractors and agents must physically inspect the easement area

for general environmental assessment purposes and to identify possible hazards, unrecorded easements and trespassers, and to make a preliminary evaluation of the condition of the property for future development of a trail. If there are any structures and improvements (roads, fences, utilities, etc.), that are part of the Trail Easement acquisition, these shall be further evaluated. Any encroachments, potential property boundary disputes, or unrecorded use of the easement area identified either during property inspection or in title search will be resolved prior to closure unless deemed impractical by the Due Diligence Team and the Natural Areas Program Director has authorized closing notwithstanding such circumstances(s).

3. Environmental Inspection. A Phase I ESA is not necessary on all potential easement acquisitions unless (a) the Metro Attorney determines that a Phase I is advisable based on information learned in the course of its due diligence, (b) the Trail Easement is purchased in fee title, or (c) such assessment is required by the local jurisdiction to which Metro will assign its interest in the Trail Easement at closing. The Office of the Metro Attorney has determined that, while potential liability is not zero, the chances of an easement holder being held liable for environmental contamination on a property are extremely low, and that provisions within the Purchase Agreement will provide sufficient protection from such liability (unless, of course, the contamination was directly caused by or exacerbated by the actions of the easement holder). To the extent any Phase I ESA reports exist on the subject Trail Easement property, acquisition staff will make every effort to obtain copies to help inform the decision of whether to proceed with the easement acquisition.
- Unusual Circumstances. If, in the course of *Trail Easement Due Diligence*, the Due Diligence Team discovers any unusual deed or title restrictions, encumbrances, or other conditions that may prohibit or unduly restrict Metro's ability to use the property as a trail or that may create a liability to Metro, such restrictions, encumbrances, or conditions shall be considered "unusual circumstances." As provided in the section of this Work Plan regarding *trail easement acquisition parameters*, the Chief Operating Officer and his/her designees may not complete the purchase of an easement with such unusual circumstances without obtaining the Metro Council's specific approval prior to such acquisition.
 - Ownership: When agreed to by the local jurisdiction in which the trail will be located, built, and maintained, Metro may assign its interest in the Trail Easement at closing to such local jurisdiction.
 - Document Retention. Documents related to acquisitions shall be retained as determined appropriate by the Metro Attorney and in accordance with the Uniform Act when required.

STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 10-4122, FOR PURPOSES OF AMENDING THE NATURAL AREAS IMPLEMENTATION WORK PLAN TO AUTHORIZE THE CHIEF OPERATING OFFICER TO MORE EFFICIENTLY ACQUIRE AND ASSIGN TRAIL EASEMENTS.

Date: February 4, 2010

Prepared by: Kathleen Brennan-Hunter
503-797-1948

BACKGROUND

The 2006 Natural Areas Bond Implementation Work Plan (“Work Plan”) describes a comprehensive contractual, due diligence and closing process for the acquisition of property under the 2006 Natural Areas Bond.

Metro’s Natural Areas Program Work Plan is designed to create an effective process for purchasing and protecting natural areas and trails at the regional, local and neighborhood levels. Metro’s acquisition efforts include the purchase of fee interests or right-of-way easements for trails in order to assemble corridors for future trail projects.

The acquisition of right-of-way easements for trails is the most efficient and common method of obtaining the desired property interests necessary for future trails. A trail right-of-way easement is a non-possessory interest acquired for the stated purpose of building and maintaining trails. With right-of-way easements, a property owner retains the ownership of the entire property, is responsible for the property taxes, and continues to assume liability for damages and claims on the property. The easement holder secures the rights required for the desired use.

Fee title ownership acquisitions are a lesser used method of obtaining the property interests necessary for future trails. Fee title transactions entitle Metro to ownership of the entire property where the future trail will be located. In the case of a fee title acquisition, the property owner relinquishes ownership rights in the entire property.

Once Metro acquires the necessary property interests to accommodate the proposed trail or trail segment, future federal transportation funding will likely finance trail design and construction. Metro must follow federal and Oregon Department of Transportation (ODOT) right-of-way acquisition guidelines because federal funds may be used to purchase, design or construct some part of the future trail.

In the process of implementing acquisition in various target areas, guided by refinement plan priorities, staff have identified various circumstances in which the acquisition of trail easements, or fee title property for which trails are the primary basis for a purchase (“Trail Easement Property”), require different consideration than the standard acquisition practices as put forth in the Work Plan Sections on Acquisition Parameters and Due Diligence Guidelines.

Metro staff has prepared supplemental Work Plan Acquisition Parameters and Due Diligence Guidelines to the Work Plan in order to permit staff to more effectively and efficiently execute Trail Easement Property transactions with willing sellers/grantors in a timely, effective, and consistent manner.

Metro staff is recommending the following additions to the Work Plan to more efficiently and effectively facilitate trail easement acquisitions.

1. As previously set forth in Amended Exhibit A to Resolution No. 07-3766A, Metro intends to pay no more than market value for property, it being acknowledged, however, that the Metro area real estate market is dynamic and the process of identifying fair market value is not exact. Metro's Acquisition process should provide flexibility to achieve the goals of the Natural Area Bond Measure and to reflect the actual market conditions affecting the market value of properties targeted for natural areas acquisition. With respect to Trail Easement Property, market value does not always compensate landowners for certain impacts of trail development on their property that are difficult to quantify. These potential concerns are often related to security, privacy and costs related to owner attorney's review and advice. Their concerns provide barriers and objections to granting easements or selling suitable Trail Easement Property to Metro.

It is proposed that the purchase price for the Trail Easement Property may be negotiated by Metro staff within the following parameters:

- a. Equal to market value as established by the prescribed appraisal and appraisal review process (note that Metro will actively solicit Trail Easement Property donations and bargain sales); or
 - b. Not more than 25% or up to \$20,000 above such market value and the Natural Areas Program Director has authorized acquisition of the property at such price after finding that acquisition of the property at the negotiated purchase price is in the public interest. In order to conclude that such a purchase is in the public interest, the Natural Areas Program Director must conclude that:
 - The seller/grantor has rejected the fair market value as established by the appraisal and appraisal review processes described below and has provided a reasonable basis for the additional compensation;
 - The failure to acquire the property will significantly compromise Metro's ability to achieve the goals described in the applicable adopted Refinement Plan for that target area; and
 - The purchase will not reduce the amount of funds available to purchase other critical, high priority target properties in a manner that will significantly compromise Metro's ability to achieve the goals described in the applicable adopted Refinement Plan for that target area.
2. Acquisition of trail easements, in most cases will be governed by Federal Acquisition Guidelines as administered by the Oregon Department of Transportation. To address landowners concerns of acquisition impacts related to security, privacy and costs related to owner attorney's review and advice, these guidelines provide the opportunity for offering greater compensation than the approved amount as determined by the property appraisal ("Administrative Settlements"). Following the Federal Acquisition Guidelines process assures that the governing body holding Trail Easement Property is eligible for future federal funding to assist or finance local or regional trail construction. For justified cases, Metro's Trail Easement Acquisition process should incorporate the option to offer Administrative Settlements in order to provide flexibility to achieve the goals of the Natural Areas Bond Measure.
 3. In most cases, Metro will not be the long term developer or operator of the regional trails. The Metro Council at its discretion may assign its interest in acquired Trail Easement Property to

another park-providing entity. This new Work Plan will allow Metro's Chief Operating Officer to assign all of Metro's interest in Trail Easement Property to the local jurisdiction in which the future, proposed trail is to be located, constructed and maintained in perpetuity, without requiring further Metro Council approval. In the event a regional trail is located in an area where no local operator exists, Metro will hold the easement.

4. It is proposed that the original Environmental Review requirement for property acquisition as referenced in Amended Exhibit A to Resolution No. 07-3766A, be optional and at the discretion of the Metro Attorney within the process of trail easement acquisition. Unless required by the local jurisdiction to which Metro will assign its interest in the Trail Easement Property at Closing, the Office of the Metro Attorney ("Metro Attorney") has advised that Phase I Environmental Site Assessments ("Phase I ESA") are not necessary on potential easement only acquisitions. Further, the Metro Attorney has determined that, while potential liability is not zero, the chances of an Easement holder being held liable for environmental contamination on a property are extremely low, and that provisions within the Purchase Agreement and the recorded Easement will provide sufficient protection from such liability (unless, of course, the contamination was directly caused by or exacerbated by the actions of the Easement holder). To the extent any Phase 1 ESA reports exist on the subject Easement property, acquisition staff will make every effort to obtain copies to help inform the decision of whether to proceed with the trail easement acquisition. The option of Phase I ESA step in the easement acquisition process will also alleviate a common owner/grantor concern that a Phase I ESA could create expensive liabilities and burden the owner with the knowledge of potential environmental contamination on their property, and create a significant impediment to successful acquisition. Trail Easement Property purchased in fee title will require a Phase 1 ESA, like all other fee purchases and the due diligence guidelines as defined in Resolution No. 07-3766A will apply.

This resolution is recommended in order to permit staff to more effectively and efficiently execute trail easement transactions with willing sellers.

ANALYSIS/INFORMATION

1. Known Opposition

None.

2. Legal Antecedents

Resolution No. 06-3672B, "For the Purpose of Submitting to the Voters of the Metro Area a General Obligation Bond Indebtedness in the Amount of \$227.4 Million to Fund Natural Area Acquisitions and Water Quality Protection," was adopted on March 9, 2006.

The voters' approved Metro's 2006 Natural Areas Bond Measure at the general election held on November 7, 2006.

Resolution No. 07-3766A "Authorizing the Chief Operating Officer to Purchase Property With Accepted Acquisition Guidelines as Outlined in the Natural Areas Implementation Work Plan," was adopted by the Metro Council on March 1, 2007, and established the Acquisition Parameters and Due Diligence Guidelines for the purchase of properties as part of the 2006 Natural Areas Bond Program.

Resolution No. 08-3963 "Amending the Natural Areas Implementation Work Plan to Authorize the Chief Operating Officer to Acquire Certain Properties when the Purchase Price is equal to or less than \$5,000," was adopted by the Metro Council on July 24, 2008, and established the Acquisition

Parameters and Due Diligence Guidelines for the purchase of properties as part of the 2006 Natural Areas Bond Program.

3. Anticipated Effects


Assuming that no unusual circumstances arise, Metro will close on the Acquisition of Trail Easement Property that meet the above-referenced criteria. In the rare case that Metro acquires Fee Title to Trail Easement Property for a future Trail site, the Due Diligence Guidelines as provided within Resolution No. 07-3766A, requiring completion of a Phase 1 Environmental Assessment, will be followed.

4. Budget Impacts

Expenditures for purchases and related due diligence are budgeted in the Natural Areas Bond Fund.

RECOMMENDED ACTION

The Chief Operating Officer recommends passage of Resolution No. 10-4122.



2009 – 10
Annual Report

**THE
INTERTWINE
ALLIANCE**

THE INTERTWINE ALLIANCE

40 Mile Loop Land Trust ■ **Audubon Society of Portland** ■ **Barlow Trail Association**
Bicycle Transportation Alliance ■ bicycle.org ■ Chinook Trail Association ■ City of
Durham ■ City of Fairview ■ City of Forest Grove ■ City of Gladstone ■ City of
Hillsboro Parks & Recreation ■ **City of Portland Bureau of Environmental Services**
City of Portland Water Bureau ■ City of Tigard Parks & Recreation ■ City of Troutdale
Parks ■ City of Tualatin ■ City of West Linn Parks & Recreation ■ City of Wood
Village ■ Clackamas County Soil and Water Conservation District ■ Clackamas County
Urban Green ■ **Clean Water Services** ■ Columbia Land Trust ■ **Columbia Slough
Watershed Council** ■ Columbia Sportswear ■ Cornelius Parks & Recreation ■ **Cycle
Oregon** ■ Doubletree Hotel and Executive Meeting Center ■ Entercom ■ Forest
Grove Parks & Recreation ■ **Forest Park Conservancy** ■ Friends of Baltimore Woods
Friends of North Clackamas Parks ■ Friends of Smith and Bybee Lakes ■ Friends of
Trees ■ Gresham Parks & Recreation ■ Hoyt Arboretum ■ Jackson Bottom Wetlands
Preserve ■ Johnson Creek Watershed Council ■ Jubitz Corp ■ Kaiser Permanente
■ **KEEN Footwear** ■ Kimpton Hotel ■ Lake Oswego Parks & Recreation ■ **Metro
National Park Service** ■ National Recreation and Park Association ■ Native American
Youth Association ■ Nau Incorporated ■ **Nelson Nature Photography** ■ New Seasons
■ North Clackamas Parks & Recreation ■ **Northwest Trail Alliance** ■ **npGreenway**
ODS ■ Oregon City Parks & Recreation ■ Oregon Parks & Recreation ■ Oregon
Trout ■ Healthy Waters Institute ■ Portland General Electric ■ **Portland Parks &
Recreation** ■ **Portland Parks Foundation** ■ Providence Health ■ Sauvie Island
Conservancy ■ Sherwood Parks Department ■ Southwest Washington Convention &
Visitors Bureau ■ The Bike Gallery ■ The Nature Conservancy of Oregon ■ Three
Rivers Land Conservancy ■ Travel Oregon ■ **Travel Portland** ■ **TriMet** ■ **Trust for
Public Land** ■ **Tualatin Hills Parks & Recreation District** ■ **Urban Greenspaces Institute**
■ US Fish and Wildlife ■ US Forest Service ■ **Vancouver Watersheds Council**
Vancouver-Clark Parks & Recreation Dept ■ Washington County Facilities and Parks ■
Wallis Engineering ■ Washington County ■ Washington County Visitors Association
Wetlands Conservancy ■ Wilsonville Parks & Recreation

Many organizations have contributed to our success to date. The organizations listed in **bold** have signed-on as formal Intertwine Partners and are the foundation of The Intertwine Alliance.



April 9, 2010

Dear Intertwine Alliance Partners,

In the spring of 2007 we invited Chicago Mayor Richard Daley and other parks visionaries to a “Connecting Green” summit at the Gerding Theater and challenged ourselves to be bolder in our aspirations for the region’s network of parks, trails and natural areas. Our plan centered on the notion that we might build on years of experience collaborating on urban conservation to create a new kind of alliance, one that makes us, both individually and collectively, more visible, efficient and effective.

Since that first Connecting Green summit almost three years ago, dozens of organizations and hundreds of civic leaders, elected officials, private executives and professionals from many fields have invested time and money in the inter-organizational collaboration we now call The Intertwine Alliance. This report is our first formal accounting of results. The growth of The Intertwine Alliance has been rapid. The Alliance is quickly becoming a powerful movement with some important early victories. However, the intention of this report is to address both challenges as well as successes. There are two challenges that we want to respond to up front. These are questions that even the core group of die-hards that has been pushing the Alliance relentlessly forward for three years has, at times, had to confront: Is The Intertwine Alliance here to stay? And, will the Alliance help my cause?

IS THE INTERTWINE ALLIANCE HERE TO STAY?

New initiatives come and go. What makes this one different? One clear difference from past initiatives is that The Intertwine Alliance is not solely a government program or solely a nonprofit initiative, but a collaboration of many partners. It is not dependent on any



single agency, organization or leader and hence is far less likely to be swept out with the next election or the fortunes of one civic leader or another. Many private firms, nonprofit organizations and government agencies have invested their time, money and individual leadership to establish the Alliance. Each now has “skin in the game” and a stake in its success. Each adds strength and stability.

Further, as the Alliance continues to demonstrate its viability and effectiveness, partners are making increasingly durable investments in it. The Intertwine logo is starting to appear on parks signs and on the cover of books and other publications. Government agencies and nonprofit organizations are building The Intertwine into their budgets as a regular part of how they do business. Alliance partners are investing in The Intertwine for the long term. That is not to say that The Intertwine Alliance will not weather some storms as it continues to mature as a permanent fixture in the region. For example, one of our principle leaders, Intertwine founding visionary David Bragdon, will complete his second and final term as Metro Council President in January of 2011. While his platform will change, we certainly hope that we will continue to benefit from his leadership. We think, though, that regardless of the role that Council President Bragdon or any other individual Intertwine leader chooses in the future, the talent pool of committed leaders and the organizational support we now have in place is deep enough to sustain the Alliance.

WILL THE ALLIANCE HELP MY CAUSE?

The value proposition offered by the Alliance is clear, and has been borne out by the results documented in this report:

- **WE CAN BE MORE EFFECTIVE AS AN ALLIANCE.** We are more efficient and make a better case for our cause when we set clear regional priorities and work collaboratively towards them. Resources are scarce. We’ve got to create efficiencies by integrating our work on conservation, parks, trails, education and communications.
- **WE CAN BETTER CONNECT RESIDENTS WITH NATURE AS AN ALLIANCE.** We connect more deeply with residents when we join forces to co-brand and co-market the region’s natural assets. Acting alone, none of us has the budget to establish a regional brand and create a movement; acting collectively, we do.
- **WE CAN ATTRACT MORE INVESTMENT AS AN ALLIANCE.** We are more visible and more compelling to funders when we speak with one voice. Despite years of work, we are still at the point where the region’s natural areas are as much as 50% ecologically

degraded, and at the current pace our trail network will not be completed for more than 190 years. We can't succeed without investment and we won't get the investment we need without an alliance.

The Intertwine Alliance is based on the proposition that if we are truly going to create the world's greatest network of parks, trails and natural areas it is going to take more than business as usual – it will take a movement. That is what will be required to change the transportation paradigm so that trails and other active transportation routes are viewed as serious transportation, not just “nice to haves.” It is necessary if we are to change the public investment paradigm so that parks, trails and natural areas are recognized as an integral element of our community's essential assets, just like schools, pipes and roads. We will need a strong and energized coalition to establish state and national standing for urban conservation, so that its special educational opportunities and ecosystem values are recognized and attended to. Finally, it will take all of us working together to fully engage the residents of the region, ensuring that this and future generations will live healthier, happier lives and be better stewards of the natural assets of the Portland-Vancouver metropolitan region.

Thank you for being part of that movement and for your interest in this first accounting of what we believe will be an enduring and notable success story, both here in the Portland-Vancouver metropolitan region and nationally.

Sincerely,



Mike Wetter
on behalf of The Intertwine Alliance Core Group

TABLE OF CONTENTS

What Makes the Intertwine Alliance Different? **5** A Brief History of the Intertwine Alliance **7** Five Intertwine Initiatives and the “Core” that Holds It All Together **9**
How The Intertwine Alliance Is Organized **10** Intertwine Initiative Updates **11**
Communications and Branding **20** Our Predictions for 2010-11 **22**



THE INTERTWINE IS SIMULTANEOUSLY A PLACE,
A COALITION, A STRATEGY AND A WAY OF LIFE.
IT GIVES IDENTITY TO THE NETWORK OF PARKS,
TRAILS AND SPECIAL PLACES THAT RESIDENTS
OF THE PORTLAND METROPOLITAN REGION

HAVE ALWAYS LOVED AND ENJOYED BUT WHICH HAVE NEVER BEFORE
BEEN HOLISTICALLY PRESENTED. IT CONNECTS AND ORGANIZES MANY
DISPARATE ORGANIZATIONS INTO A UNIFIED AND EFFECTIVE FORCE. IT
RAISES THE BAR ON WHAT WE BELIEVE CAN BE ACHIEVED IN TERMS
OF ACRES RESTORED AND ACQUIRED, MILES OF TRAIL BUILT, AND THE
QUALITY AND NUMBER OF PARKS AVAILABLE TO THE PUBLIC. MOST
IMPORTANTLY, THE INTERTWINE MORE DEEPLY CONNECTS RESIDENTS
WITH NATURE.



WHAT MAKES THE INTERTWINE ALLIANCE DIFFERENT?

SEVEN PRINCIPLES THAT DISTINGUISH OUR WORK

The Intertwine Alliance is not just another nonprofit organization; it is a new way of doing business. In fact, The Intertwine Alliance is more a movement than an organization. It is founded on seven principles:

1. TO CONNECT. We create forums to share information and expertise including networking events and an online community. By sharing information and better integrating our work we leverage organizational strengths and resources to achieve the greatest impact.

2. TO BE INCLUSIVE. Our strength is in our coalition. We ensure that there is a seat at the table for those who are interested and willing to contribute. While we recognize that not every organization can be involved in every decision, our door is always open and we work towards consensus on major decisions.

3. TO BUILD THE CAPACITY OF COALITION PARTNERS. The purpose of the coalition is to integrate, not duplicate; we are a conduit for new resources rather than a new competitor for existing funds. The Alliance only performs those tasks that require a coalition or the integration of information or plans. Everything else is left to the partners in the coalition themselves, ensuring that we help build their capacity. The Alliance leverages the work that local, regional, state and federal government agencies and nonprofits are already doing.

“Being part of the Alliance is making us stronger. We are making progress on both the regional and the national stage that could not have been achieved by another means. These results will only continue to compound over time.”

– Meryl Redisch, Executive Director, Audubon Society of Portland

4. TO KEEP A SMALL FOOTPRINT. Rather than hire staff and rent office space, Alliance partners pitch in and get the work done mostly with existing staff. This arrangement works because Intertwine partners recognize that work they do for The Intertwine is an effective way to achieve their organization's mission.

5. TO BRING IN MORE MONEY. The Intertwine Alliance is effective at bringing in new investment because it is able to present clear regional priorities, better leverage funds and help build collaborative strategies for implementation. Investors have confidence that their funds achieve optimal results.

6. TO MAKE THE MOVEMENT VISIBLE. We have established a brand and the collective energy that makes it clear there is a movement afoot. By banding together behind a unified banner (The Intertwine) we attract new notice from policymakers, funders and the residents of the region.

7. TO COLLABORATE. The Alliance adds value by bringing organizations and information together in new ways. For example, The Intertwine Alliance is helping bring together years of conservation planning work into an integrated regional conservation plan. The Alliance is helping integrate parks and trail data, transit information and information about restaurants, lodges and art galleries into a single, searchable website. If a project requires integration or a coalition, the Alliance is likely the right organization for the job.

A BRIEF HISTORY OF THE INTERTWINE ALLIANCE

HOW WE GOT WHERE WE ARE TODAY

The events leading to today's formalized alliance date back to the late 1980s, when a handful of citizens worked with Metro and local park providers to establish a new regional Metropolitan Greenspaces Program. This effort brought elected officials from throughout the Portland-Vancouver region together to create a masterplan for a bi-state, interconnected system of parks, trails and natural areas.

Building on that legacy, in 2006 a still ad-hoc coalition of organizations mobilized to successfully pass a \$227.4 million bond for natural area acquisition in the Portland metropolitan region. In May of 2007, this coalition, led by Metro Council President David Bragdon, invited a host of parks visionaries from around the US, including Chicago Mayor Richard Daley, to a summit in Portland to explore the potential for a much more ambitious





Lisa Goorjian, Vancouver-Clark Parks & Recreation, pledges support for the Alliance at a founding meeting at Bridgeport Brewpub in April 2008. (Photo M. Houck)

agenda. Following that “Connecting Green” summit, a core group of park and conservation leaders began regular meetings to solidify the emerging coalition.

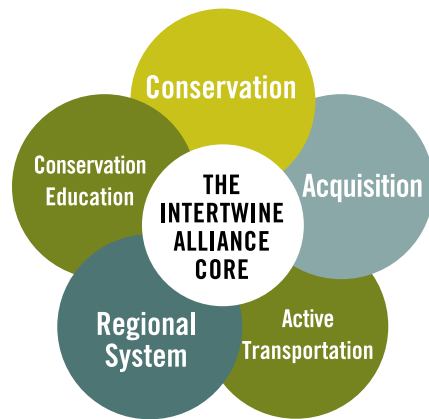
In April 2008, in a packed upstairs room of the Bridgeport Brewpub on the 20th anniversary of the Metropolitan Greenspaces movement, dozens of civic, nonprofit and private leaders pledged their support to what was then called the “Connecting Green Alliance.”

The Connecting Green Alliance joined with conservation coalitions in Chicago (Chicago Wilderness), Houston (Houston Wilderness), Cleveland (the Lake Erie Allegheny Partnership for Biodiversity) and, later, Los Angeles (Amigos De Los Rios) to begin working with federal officials to establish metropolitan conservation

coalitions as the best practice for federal investment in urban conservation.

The Alliance organized initiatives in conservation, active transportation, conservation education, the regional system (integration and management of parks, trails and natural areas) and acquisition, but the most visible of all Alliance projects was the launch of a new name, logo and brand. Working with Alliance partner Travel Portland and their branding firm, Sockeye Creative, “The Intertwine” was launched as part of the annual “Parking Day” celebration in September 2009.

FIVE INTERTWINE INITIATIVES AND THE “CORE” THAT HOLDS IT TOGETHER



The Intertwine daisy

The Intertwine Alliance is organized into five interrelated initiatives as illustrated by the graphic to the left. The primary objective of these initiatives (sometimes called “petals” because the diagram resembles a daisy flower) is to help Intertwine partners become more effective and to increase investment in The Intertwine through collaboration, branding, communications, networking, strategy, advocacy and by developing regional plans and setting priorities. Partner organizations may participate in one or more of these initiatives.

1. THE CONSERVATION INITIATIVE is protecting and restoring the region’s biodiversity and fish and wildlife habitats.

2. THE ACTIVE TRANSPORTATION INITIATIVE is completing a network of bicycle and pedestrian trails and routes spanning the region.

3. THE ACQUISITION INITIATIVE is purchasing and protecting the best remaining land in the region to put into public ownership as parks, trails and natural areas.

4. THE REGIONAL SYSTEM INITIATIVE is defining, building and maintaining an integrated, world caliber network of parks, trails and natural areas.

5. THE CONSERVATION EDUCATION INITIATIVE is fostering stewardship by ensuring that residents of all ages have high quality opportunities to learn about all elements of The Intertwine.

THE INTERTWINE CORE ensures there is communication among the initiatives (petals) and promotes The Intertwine brand. The “core group,” advocates for policy initiatives and funding, facilitates collaboration, convenes research forums and tracks progress towards implementing The Intertwine vision.

HOW THE INTERTWINE ALLIANCE IS ORGANIZED

A COALITION APPROACH IS GETTING RESULTS

There are several ways for individuals and organizations to participate in The Intertwine. In fact, The Intertwine is founded on the principle of collective, collaborative action and relies on the direct participation of partners.

COUNCILS. All Intertwine partners are members of “The Intertwine Council of Partners,” which meets at least twice a year to help direct Intertwine activities. Other councils may be formed to set direction, shape strategy and champion the work of Intertwine “petals.” For example, an Executive Council for Active Transportation is made up of public, private and nonprofit leaders that champion the Active Transportation petal.

WORK GROUPS. The day-to-day work of each of The Intertwine petals and the work of the core is accomplished by work groups of professionals and citizen volunteers who provide research, coordination, meeting management, event management, planning, analysis and other necessary skills. For example, there is a work group that conducts the work of the Intertwine Alliance “Core” that is called the “Core Group.” Work groups are open to anyone interested in making a commitment to help with the work of The Intertwine Alliance.

FORUMS. Forums are large gatherings of those working on The Intertwine or on a particular Intertwine topic or petal. These meetings are important opportunities for professionals and citizen volunteers to share information and make connections. The “quarterly trails meetings” are an example, as are The Intertwine Alliance summits. Forums are open to all.

EVENTS. The Intertwine Alliance uses large-scale events to promote and celebrate The Intertwine. The annual “Park(ing) Day” celebration is an international event created by art and design collective Rebar in 2005 to celebrate green space in the urban environment. At the 2009 Park(ing) Day celebration, more than 20 local organizations collaborated to sponsor 17 different Park(ing) Day parks as the public launch of The Intertwine throughout our region. These spots were visited by hundreds.

BECOME A PART OF A GROWING MOVEMENT: BECOME A PARTNER!

Pledge your support and become a partner in the coalition. Tell us your interests and we’ll help you participate in ways that best meet your organization’s needs and objectives. Contact us at csulaski@theintertwine.org or (503) 288-5790 for more information.

INTERTWINE INITIATIVE UPDATES

REGIONAL SYSTEM INITIATIVE

The goal of the Regional System Initiative is to achieve an integrated, world caliber interconnected network of parks, trails and natural areas. Local, regional and state parks providers are working to set priorities for the care and development of the system. In the long term, the Regional System Initiative plans to put in place a mechanism by which to plan and pay for parks, trails, natural areas and greenways as essential public assets, similar to the approach already taken for public services such as transportation, water, land use and public safety.

CURRENT AND RECENT PROJECTS

REGIONWIDE SIGNING. Sea Reach, Ltd. has a contract to complete an Intertwine signage plan by the summer of 2010. These signs will complement existing and future signage at intertwine sites. This is part of a broader effort, being conducted by The Intertwine core group, to brand and market The Intertwine through travel information, advertising, websites, maps and events.

SYSTEM ANALYSIS. This initiative will inventory the region's parks, trails and natural areas, identify needs and document their benefits. Alta Planning has a contract to complete this work by the fall of 2010. This project will help The Intertwine Alliance plan for the future expansion and funding of the regional parks system.



BI-STATE TRAIL PLAN. A working group consisting of the National Park Service's Rivers and Trails Conservation Assistance Program; Vancouver-Clark Parks; Metro; and the Urban Greenspaces Institute has created the first ever Bi-State Regional Trails Plan that will be unveiled at the April 9, 2010 The Intertwine Alliance summit

Left. A long-term plan is in process but Vancouver-Clark Parks & Recreation was eager to get started. The Intertwine logo will soon appear on some park signs in Vancouver.

ACTIVE TRANSPORTATION INITIATIVE

The goal of the active transportation initiative is to complete a network of bicycle and pedestrian trails and routes spanning the region. The total network will span more than 900 miles. At current levels of investment, it will take more than 190 years to complete the network. The Intertwine Alliance has formed an Active Transportation Council to pursue federal transportation and stimulus funding, as well as local and regional funding, with the goal of significantly accelerating the completion of the network. Chaired by Jonathan Nicholas, Vice President of Corporate Communications for ODS, the Council includes elected officials, corporate executives and civic leaders.

CURRENT AND RECENT PROJECTS

CASE AND STRATEGY. In 2008, Metro convened a Blue Ribbon Committee for Trails that considered the costs and benefits of active transportation and determined that the region should increase its commitment. The committee developed a case and strategy for active transportation and staff mapped, cost-estimated and documented twenty major trails.

ACTIVE TRANSPORTATION CORRIDORS. State, regional and local government planners are working to identify and plan “active transportation corridors” that link bicycle and pedestrian routes with transit to help travelers create “complete trips.” The strategy is to create high-performing proposals that are able to better compete for transportation funding.



In a partnership with the German Marshall Fund and the Oregon Community Foundation, Blue Ribbon Committee members studied bicycle and pedestrian systems in Amsterdam and Copenhagen.



Kelly Puntaney, Friends of Clark County, describes Vancouver's Burnt Bridge Trail and Greenway to participants in the Annual Policy Makers Ride. (Photo M.Houck)

NEW STATE FUND. The Intertwine's Active Transportation Initiative helped establish a new state trail fund in the Oregon Department of Transportation and has helped increase the amount of federal transportation funding from the Metropolitan Transportation Improvement Program that is invested in bicycle and pedestrian projects.

FEDERAL INVESTMENT. The Active Transportation Council selected four "active transportation corridors" to be submitted for \$100 million in federal stimulus funds under the Transportation Investment Generating Economic Recovery (TIGER) program. The application was not successful, but it is likely that a second application will be submitted.

CITY OF PORTLAND BICYCLE PLAN. The City of Portland, an Intertwine partner, completed the Portland Bicycle Plan for 2030, which would triple the miles of bicycle routes in the City over the next 20 years. The City Council adopted the plan on February 11, 2010. The Council also approved a proposal by Mayor Adams to provide a \$20 million "kick start" for the plan by coordinating investments with the Bureau of Environmental Services.

REDUCE FEDERAL BARRIERS. The Intertwine Alliance is working with Congressman Earl Blumenauer and the office of the US Secretary of Transportation to address federal regulations that make it difficult and expensive to build trails and bicycle routes with federal funds. The Intertwine Alliance is working with conservation coalitions in Chicago, Cleveland, Houston and Los Angeles to respond to a request by the Secretary's office for specific federal regulations that need to be changed.

INTERTWINE INITIATIVE UPDATES

CONSERVATION INITIATIVE

The goal of the conservation initiative is to protect and restore the region's biodiversity and fish and wildlife habitats. The Intertwine Alliance provides an opportunity to unify efforts that are ongoing across the bi-state area and to provide a forum to advance conservation outcomes at different scales. From urban ecoroofs to oak prairie restoration, the conservation initiative covers a broad spectrum of strategies implemented by various partners. Funding requests to implement key conservation priorities are pending.

CURRENT AND RECENT PROJECTS

REGIONAL CONSERVATION AND BIODIVERSITY FRAMEWORK. A broad coalition of partners, including local, state and federal officials as well as nonprofit leaders, is developing a regional conservation and biodiversity framework. This science-based effort will identify regional priorities to protect and restore habitat and will be used to attract new investment in restoration and conservation activities. The first elements of the framework will be complete in the spring of 2011.

COLLABORATIVE RESTORATION. Scientists and natural area resource managers from around the region are working to develop a better understanding of what kind of



Overlook Bluff (Before): Invasive species had overwhelmed natural vegetation, degrading the area's ability to support natural systems.



Overlook Bluff (After): Portland Parks and Recreation restoration efforts show dramatic results. (Photos by Portland Parks and Recreation)

restoration – and how much of it – is happening around the Intertwine. They are sharing information and best practices that will lead to more effective and integrated restoration projects.



URBAN AND RURAL RESERVES MAPPING. Local nonprofit organizations created the first base map of the Portland-Vancouver region’s most significant ecological landscapes, which was used by Metro and Clackamas, Multnomah and Washington Counties to assess where future Urban and Rural Reserves should be located. This mapping effort will be updated to create a starting point for a regional conservation map.

ROSS ISLAND. Ross Island is undergoing restoration by Ross Island Sand and Gravel and City of Portland Bureau of Parks and Recreation to improve fish and wildlife habitat through the creation of shallow water resting areas for salmon, emergent wetlands and riparian habitat for wildlife. The island is host to one of the region’s bald eagle nesting sites and great blue heron nesting colonies.

OAKS BOTTOM WILDLIFE REFUGE. Restoration has progressed over the past six years. Many acres of Himalayan blackberry, English ivy and clematis have been removed from the bluff overlooking the 160-acre refuge and replaced with native shrubs and trees, thereby diversifying habitat for the more than 100 species of birds, mammals, amphibians and reptiles that migrate through or reside year around in the city’s first official urban wildlife refuge.



Oaks Botom Wildlife Refuge (foreground) and Ross Island (Photo M. Houck)

INTERTWINE INITIATIVE UPDATES

CONSERVATION EDUCATION INITIATIVE

The goal of the conservation education initiative is to foster stewardship by ensuring that residents of all ages and socio-economic backgrounds have high quality opportunities to learn about the environment. There are over 230 identified providers of educational programming that bring people to The Intertwine. Providers are beginning to work together to exchange best practices including how to best measure educational outcomes.

CURRENT AND RECENT PROJECTS

OUTDOOR SCHOOL. In 2008 the Metro Council established a fund of \$1.4 million per year for the conservation education petal of The Intertwine, with the specific purpose of making outdoor school available to more 6th graders. A grant is pending to the U.S. Department of Education to extend outdoor school and follow-up programming to even more students, especially the disadvantaged.



Young naturalists on the trail in Oaks Bottom Wildlife Refuge. Photo by M. Houck



WILD IN THE CITY, EXPLORING THE

INTERTWINE. The second edition of the highly acclaimed *Wild in the City: A Guide to Portland's Natural Areas* is in progress. The updated edition has a new title: *Wild in the City, Exploring The Intertwine*. The guide will highlight over 100 parks, natural areas, water trails and hiking paths throughout the Portland /Vancouver metropolitan region. Exploring The Intertwine's production

team includes co-editors Mike Houck, director of the Urban Greenspaces Institute and writer M J Cody; Bob Wilson; Martha Gannett, Gannett Design; and Bob Sallinger, Director of Portland Audubon's Conservation Program. Release will be spring, 2011.

ASSESSING OUTCOMES. There are many educational activities currently taking place in the region. For example, over one hundred local friends organizations, park providers and agencies lead field trips, a well established practice for many years. The Conservation Education Initiative is working to ensure that conservation education efforts are leveraged as much as possible, that we use our strengths and assets to reach desired audiences and that we are using state-of-the-art assessment tools to ensure that we achieve greatest impact.



(Photo M. Houck)

INTERTWINE INITIATIVE UPDATES

ACQUISITION INITIATIVE

The goal of the Acquisition Initiative is to purchase and protect the best remaining land in the region to put into public ownership as parks, trails and natural areas. Acquisition is the farthest along of all The Intertwine initiatives, with voters approving Metro regional measures in 1995 (\$135.6 million) and 2006 (\$227.4 million); a Tualatin Hills Parks and Recreation District measure in 2008 (\$100 million); and a Clark County measure in 2005 (approval for seven miles of new trails as part of the creation of the Greater Clark Park District). Since 1996 Portland Parks & Recreation has acquired a total of 1,500 acres, with about half purchased with funds from the City of Portland's Park System Development Charge Program, which was recently increased.

CURRENT AND RECENT PROJECTS

CHEHALEM RIDGE ACQUISITION. Intertwine partners Metro and the Trust for Public Land recently purchased 1100 acres on Chehalem Ridge, near Forest Grove, that will one day be a major new regional park with areas for family picnics and trails.



The view from Chehalem Ridge.



Opening Cooper Mountain Regional Park, 2009 (Photo M. Houck)

COUGAR CREEK WOODS. In 2009 Vancouver-Clark Parks acquired the Cougar Creek Woods, a 10-acre parcel in the Felida Neighborhood of Clark County along the western slopes of the Cougar Creek Greenway. Preservation of the site from development will

provide a community park, trail corridor, riparian habitat, surface water management and protection for threatened plant species.



Family paddle in Ross Island Lagoon
(Photo M. Houck)

ROSS ISLAND. In 2007 Ross Island Sand and Gravel donated 45 acres of one of Portland's landscape icons, Ross Island. While the rest of the 300-acre Ross Island archipelago remains in private ownership, it is hoped that once reclamation is completed in 2013 more of the islands will come into public ownership.



COMMUNICATIONS AND BRANDING

The goal of the communications and branding element of The Intertwine initiative is to implement The Intertwine brand such that it becomes a part of everyday life in the Portland/Vancouver metropolitan region. An inter-agency work group is developing and managing The Intertwine branding, marketing and communications strategy.

CURRENT AND RECENT PROJECTS

NEW NAME, LOGO AND “LOOK AND FEEL.” The Intertwine initiative was originally called “Connecting Green.” This name, while perfectly suitable as a name for the initiative, was less than ideal as a name for the place. What was needed was a name that could embody the spirit of our natural and recreational systems and capture the imagination of the region’s residents. “The Intertwine” is a name, logo and brand that accomplishes this. Like all Alliance projects, The Intertwine brand was developed collaboratively, with Travel Portland serving as project manager and creative work by Sockeye Creative.



PUBLIC LAUNCH OF THE BRAND.

“The Intertwine” got its public debut on September 18, 2009 in conjunction with “Park(ing) Day.” Intertwine booklets, buttons, T shirts and directional signs were visible region-wide as Intertwine partners constructed 17 temporary parks in parking spaces throughout the Portland/Vancouver metropolitan area.

The Intertwine was also featured on the backs of TriMet buses.

NEW WEBSITE. TheIntertwine.org (phase one) went live in September 2009, featuring a resource directory, Intertwine maps and 25 rich Intertwine experiences, from bird watching to picnicking to paddling the Willamette Narrows.



From left: Metro President David Bragdon kicks off Park(ing) Day festivities with Metro Councilor Carlotta Collete, Gresham Mayor Shane Bemis, Gresham Mayor Jack Hoffman and City Commissioner Nick Fish. Right: *Portland Monthly* story on Park(ing) Day.

“CO-BRANDING.” Alliance partners began using “The Intertwine” as a way to strengthen their organization’s messaging. This “cobranding” approach, where partner communications continue to carry their organization’s name and logo but also tie to The Intertwine, helps better connect residents with the full range of opportunities available region-wide. The Intertwine is on various partner websites and, thanks to Intertwine partner TriMet who is contributing roughly \$70,000 worth of ad space, will soon appear on TriMet buses.

EVENTS. The Alliance plans to integrate The Intertwine into existing successful events that carry the spirit of The Intertwine, such as Sunday Parkways.

FULLY-FEATURED WEBSITE. The next iteration of the website is underway. The goal is that the next major update will provide interactive tools that help users create their own Intertwine experiences integrating parks, trails, natural areas, waterways and other amenities. The site will also become the hub of Intertwine Alliance activity with interactive forums and project updates.





OUR PREDICTIONS FOR 2010-11

FIVE BIG THINGS THAT WE WOULD LIKE TO SEE HAPPEN IN THE COMING YEAR

1. NEW FEDERAL FUNDING FOR PORTLAND/VANCOUVER CONSERVATION AND PARKS.

In 2009, the Intertwine Alliance joined forces with conservation coalitions in Chicago (Chicago Wilderness), Houston (Houston Wilderness), Cleveland (Lake Erie Allegheny Partnership) and Los Angeles (Amigos De Los Rios) to establish the Alliance of Metropolitan Conservation Coalitions. Intertwine Alliance leaders, along with leaders from our partner coalitions, have been meeting with federal officials and members of Congress to propose that federal investment in urban conservation and parks be increased and that conservation coalitions are the best vehicle to leverage this increased investment. By April, 2011, the Alliance would like to see this work come to fruition in the form of new federal funding for parks, trails and natural areas in the Portland/Vancouver region and in metropolitan regions nationwide.

2. LAUNCH OF AN “ACTIVE LIVING” INITIATIVE.

Recent polling by one of our Intertwine partners shows potential public support for a ballot measure focused on supporting safe, active lifestyles in neighborhoods and communities. Such a measure might provide funding for the neighborhood parks, trails, sidewalks,

“I am enthusiastic about The Intertwine Alliance movement and excited about its future. The Alliance integrates our assets – the City’s parks, trails and natural areas – with those in the broader region and connects our city bureaus with a coalition of allies nationwide. It adds tremendous energy and momentum to our collective cause.”

– Nick Fish, Parks Commissioner, City of Portland

bikeways and other public investments that are essential to The Intertwine. The Intertwine Alliance would like to see such a project lift-off in 2010, with a plan to go to the ballot in November, 2012.

3. \$25 MILLION FOR ACTIVE TRANSPORTATION.

In 2009, the Active Transportation Council submitted a proposal to the US Department of Transportation for \$100 million in economic stimulus funding under the Transportation Investment Generating Economic Recovery (TIGER) program. The proposal was not successful. However, this year offers a new round of funding and another shot at a large federal infusion of active transportation funding. We would like to see the US Department of Transportation approve an Alliance application in 2010, putting in place a new “active transportation corridor” to serve the residents of the Portland/Vancouver region.

4. THE FIRST REGION-WIDE CONSERVATION PLAN IS COMPLETED.

In 2009, an Intertwine work group of natural resource scientists began developing a conservation framework, which will provide the foundational work for the region to set, and implement, regional conservation priorities. Completing a regional, multi-stakeholder conservation plan that identifies strategies and priorities is no small feat. Our counterparts at Chicago Wilderness and Houston Wilderness have done it, and the plans have proven extremely effective at mobilizing, focusing and leveraging investment and collective action. We’d like to see a plan completed in the next year that integrates conservation, climate change, green infrastructure and restoration into a single, strategic conservation plan for the region.

5. THE INTERTWINE BECOMES VISIBLE ON-THE-GROUND.

In 2009, the Alliance launched The Intertwine. However, the average person exploring the region’s parks, trails and natural areas on any given Saturday morning or on a Tuesday lunch hour wouldn’t know it yet. For 2010-11 the Alliance would like to see Intertwine logos showing up at festivals and events, on trails and parks signs and on maps and books. We’d like to see urban explorers wearing Intertwine day packs and children wearing Intertwine shoes. Maybe we are getting a little ahead of ourselves, but we’d like to see The Intertwine as a common fixture in the everyday life of the region’s residents.

