503-797-1804 TDD 503-797-1797 fax www.oregon**metro.gov**



Location: Council Chambers

Time: 7:30 a.m. to 10:30 a.m.

Subject: Natural Areas Program Performance Oversight Committee

Welcome (arrival, coffee etc.)	7:30 – 7:35
Natural Areas Program updates	7:35 – 8:30
Break	8:30 - 8:40
Discussion on Committee's annual report	8:40 – 10:30
Adjourn	10:30

Coffee, pastries and fruit will be provided

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Natural Areas Program Performance Oversight Committee

September 12, 2008

Committee Members in attendance: Linda Craig, Rocky Dixon, Michele Frank, Peter Krainock (Committee Chair), Anil Krishnamurthy, Jill Long, Jaquenette McIntire, Segeni Mungai, David Pollock

Committee Members excused: Dave Evans, Helena Huang, Don Jones, Lori Luchak, Sylvia Roll

Metro Management: David Bragdon, Kathleen Brennan-Hunter, Jim Desmond

Metro Staff: Paul Garrahan, Marybeth Haliski, Ashley Hohimer, Heather Kent, Jeff Tucker

Guest: Nancy Jerrick

Welcome

Committee Chair Peter Krainock welcomed the committee and thanked everyone for attending the meeting. He introduced Nancy Jerrick, who will be writing the committee's annual report.

Program updates

Kathleen Brennan-Hunter reviewed the acquisition, stabilization and financial reports (attached). She noted that Metro is in the process of hiring a trails planner, which will complete program staffing.

Local Share. Three more IGAs have been signed; six are still to be returned. Some of these are smaller jurisdictions and Metro is working with them to complete the documents.

Capital Grants. The Metro Council awarded \$389,500 for three Nature in Neighborhood capital grant projects, the first funded by the 2006 natural areas bond measure. The projects include \$150,000 for restoration of Crystal Springs Creek and design and construction of a new nature play area at Westmoreland Park; \$99,500 to help transform a historic property in North Portland's Humboldt neighborhood into an outdoor classroom and living laboratory; and \$140,000 to support the acquisition and development of a small neighborhood park in a park deficient, mixed-income community adjacent to permanent affordable housing. David Bragdon noted that one of the benefits of the capital grants program is that it allows us to help fund projects in areas not tied directly to one of our target areas. Rocky Dixon asked if there was a mechanism to track how grantees are spending the funds. Kathleen replied that there are benchmarks and performance measures in place to ensure grantees are in compliance. Jim Desmond noted that because the projects are capital, they are fairly easy to track. Of the projects that did not meet criteria, most did not promote re-naturing or re-greening, were not true capital projects, funds were requested to comply with regulatory issues or the jurisdiction had already budgeted for the project.

Rocky asked about continued outreach, especially to the "west side," which had fewer applications and no grant awardees in this first round. Kathleen replied that the grant review committee helped draft an outreach plan to reach area non-profits and school groups, and staff will give presentations about the program and present grant writing workshops. Peter Krainock asked if there was adequate staffing for the program; Kathleen responded yes, but she will review the staffing level in six months. Two employees

devote half of their time to the capital grants program. Segeni Mungai suggested adding program information to various jurisdictions' websites. Kathleen noted that the City of Portland does have a page devoted to the program, and agreed this was a good way to spread information about the program and solicit applications. Regarding the inequity of east side vs. west side applications, David Bragdon noted that the east side has a different level of community involvement than the west side. David Pollock said that as long as Metro documents efforts to engage west side organizations, he did not see a problem with the uneven awards. Peter acknowledged that Metro seemed to be aware of the challenges and suggested the committee review the issue next year, after the next round or two of grants are awarded. Linda Craig asked if the grant criteria is too onerous. Kathleen responded that the criteria is set out in the bond measure, but that she does not feel it is too difficult to meet the criteria. Jim Desmond noted that Metro had anticipated that the program would start slowly, and expects substantial improvement in the applications by years 3-5.

Acquisitions. Peter noted there have been a lot of acquisitions in east county. Kathleen agreed, and noted that many of the recent acquisitions are in 1995 target areas, so the groundwork had already been laid. In addition, many of the west side acquisition targets are in rural areas and are tied up with Measure 47. She noted that there are several west side projects she expects to close in coming weeks. Peter asked Kathleen what she saw as challenges; she replied it is critical to continue to work with community partners; finalize the hiring of the trails planner and make a strong push in that area; and continue to get out in the community and communicate.

Peter inquired if the double appraisal process has proven successful. Paul noted that while there have been several appraisals where the appraisers have differing interpretations, overall the process is working. He does closely review all appraisals and will contact the appraisers if the reports are widely divergent or if a specific appraiser is continuously off the mark. Rocky Dixon asked that examples of a "good" and a "bad" appraisal could be discussed at the next meeting.

Peter asked David Bragdon for a "state of the bond measure" report. David replied that from the Metro Council's standpoint, the program is a success. He noted that the refinement process was extremely well-run and very helpful, and the staff is professional and knowledgeable. David also thanked the Oversight Committee for their willingness to share their expertise.

Annual Report

Committee members discussed what was going well, and what areas still need attention:

Going well:

- Refinement process
- Program staffing
- Closing memos
- Easy-to understand financial statements; transparent budget
- Tired target areas
- Best practices for negotiation and due diligence
- Efficient Metro/committee interaction
- Well-defined criteria
- Program is politic-free (transcends electeds)
- Metro is flexible, willing and eager to accept committee input
- Informative website
- Target area tours
- Appropriate council involvement
- Equitable decision making
- Ability to say no
- Administrative costs >10%
- Response to Auditor's report

Opportunities for improvement:

- Regional equity
- Grants program
- Communications/outreach
- Signage
- Collaboration with other Metro departments/MCCI/Connecting Green
- Formally document and track "failures" in acquisition process
- Define who the sellers are
- What are the annual acquisition/financial goals and have they been met?
- Depend too much on website

Nancy Jerrick will send a draft copy of the report to the committee; Peter asked that members respond as soon as possible. The report will be presented to the Metro Council at 2:00 p.m. Thursday, October 23. It will then be sent to the media and posted on Metro's website.

David Bragdon and Jim Desmond thanked the committee for their positive comments and expertise over the past year.

Next Meeting

The committee will reconvene in early December.

Adjournment. The meeting adjourned at 10:30 am.

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File# Seller	Date	Acres	Purchase Price	Stabilization Costs	City/ Jurisdiction	County	Total Stream Frontage (ft)	% Metro Ownership	% Other Ownership	Mgmt. By	% in Tier 1
95 Bond Target Areas Goal: 850 acres	,							:			
Dairy and McKay Creeks Confluence	rce .										
07.039 Wetter Trust	4/13/2007	93.3	\$700,000	\$6,917	Unincorporated	Washington	5,280	100		Metro	100.00%
		93.3	\$700,000	,				-			-
두											
02.097 Miller	6/30/2008	20,99	\$3,000,000		Happy Valley	Clackamas	1,404	97	ديا	NCPRD	100.00%
02.125 Darby Ridge	6/6/2007	37.3	\$3,600,000	\$5,920	Gresham	Multnomah	0	75	25	Gresham	0.00%
02.135 Persimmon	7/20/2007	70	\$3,454,920	\$20,668	Gresham	Multnomah	0	100		Metro	100.00%
02.136 Persimmon	7/20/2007	80	\$198,250	\$819	Gresham	Multnomah	0	100		Metro	100.00%
Forest Park Connections		136.29	\$10,253,170								
06.058 Margolis	3/27/2007	57.5	\$1,790,000	\$47,582	Unincorporated Multnomah	Multnomah	0	100		Metro	100.00%
		57.5	\$1,790,000								
Tualatin River Greenway					*			,			
11.031 Kapaun	9/28/2007	0.41	\$275,000	\$6,478	Unincorporated Clackamas	Clackamas	410	100		Metro	0.00%
		0.41	\$275,000		,				-		
# of Transactions: 7	Acres:	287.5	\$13,018,170	\$88,384			7,094		Tota	Total % Tier 1 Acres: 86.88%	res: 86.88%
Abernethy and Newell Creeks Goal: 150 acres				·							
03.053 Evanson/TPL	8/13/2007	106.66	\$1,140,000	\$4,294	Unincorporated Clackamas	Clackamas	0	100		Metro	100.00%
# of Transactions: 1	Acres:	106.66	\$1,140,000	\$4,294			. 0		Tota	Total % Tier I Acres: 100.00%	cres: 100.00%
Chehalem Ridgtop to Refuge Goal: 400 acres			**						λ ;		
	2/11/2008	36.3	\$1,146,500	\$7,800	Unincorporated Washington	Washington	0	100		Metro	100,00%
48.001A Berry Property (Hamacher/P	12/31/2007	4.2	\$0		Unincorporated Washington	Washington	0	. 100		Metro	0.00%

Clackamas River Bluffs and Greenw Goal: 450 acres

of Transactions: 2

Acres:

40.5

\$1,146,500

\$7,800

0

Total % Tier 1 Acres: 89.63%

	%: 7.70%	Total % Tier 1 Acres: 7.70%	Ťotal		275				\$10,336,577	70.68	Acres:	# of Transactions: 7
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Seller Dat Acres Prichase Coist Lurisdiction City Total Stream % Metro % Other % Oth	100.00%	Milwaukie	100		0	Clackamas	Milwaukie		\$325,000	0.79	1/17/2008	
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Purchase Stabilization City/ Total Stream % Metro	% in Tier 1	Mgmt. By			Frontage (ff)		Jurisdiction	Costs	Price	Acres	Date	File# Seller
			% Other	% Metro	Total Stream		City/	Stabilization	Purchase			

Total Acres Acquired: Total Number of Acquisitions:	# of Transactions:	55.002 Stevens	Stafford Basin Goal: 200 acres	# of Transactions: 2	54,006 Brown	54.001 Burge Trust	Lower Tualatin River Headwaters Goal: 400 acres	File # Seller
ired: :quisitions:		es t		2			er Headwaters	
793.28 33	Acres:	6/20/2008		Acres:	4/30/2007	5/2/2007		Date
To Total	24.7	24.7		97.12	44.19	52.93	·	Acres
Total Purchase Price: Total Stabilization Costs:	\$1,800,000	\$1,800,000		\$1,052,500	\$244,000	\$808,500		Purchase Price
	CONTAN CONCENTRACIONA MONTA TRACE IN-LOCAL I			\$10,638	\$5,394	\$5,243		Stabilization Costs
\$44,112,497 \$161,101	COLADA, at the Addition to Condense Andrews Congress by East VI	Lake Oswego Clackamas			Hillsboro	Unincorporated Washington		City/ Jurisdiction
	State AA Ago e AA balaka miro kondinarra pe	Clackamas			Washington	Washingto		County
Total Stream Fron	4,550	4,550		9,240	n 0	n 9,240		Total Stream Frontage (ft)
Stream Frontage: 28,375 Feet / 5.37 Miles	ARA VERKA KANNA ARRA ARRA ARRA ARRA ARRA ARRA	100	•		100	100		% Metro Ownership
Teet / 5	Tot			Tot			-	% Other Ownership
.37 Miles	Total % Tier 1 Acres: 100.00%	Metro		Total % Tier 1 Acres: 100.00%	Metro	Metro		Mgmt. By
	res: 100.00%	100.00%		res: 100,00%	100,00%	100.00%		% in Tier 1

Stabilization Report

	1	· (
File# Seller	Date	Acres	Regional Bond \$	City/Jurisdiction	% Other Ownership	Mgmt by	Stabilization Report	Date Completed	Stabilization Comments
TargetArea: 95 Bond Target Areas	Areas							•	
Dairy and McKay Creeks Confluence 07.039 Wetter Trust 4/13/20	fluence 4/13/2007	93.30 93. 3	\$700,000	Unincorporated		Metro	Completed		**
East Buttes	٠	į	# 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0					•	
	6/30/2008	20.99	\$2,900,000	Happy Valley	ယ	NCPRD			
02.125 Darby Ridge 02.135 Persimmon	6/6/2007 7/20/2007	37.30 70.00	\$2,700,000	Gresham	25	Gresham	Completed		
	7/20/2007	8.00	\$198,250	Gresham		Metro	Completed		
		136.29	\$9,253,170				Company of		
+				-					
06.058 Margolis	3/27/2007	57.50 57.5	\$1,790,000 \$1,790,000	Unincorporated		Metro	Completed	10/18/200	
l onquin Geologic 08.024 Dammasch DAS	7/25/2008	19.76	\$186,300	Wilsonville		Metro			
Tualatin River Greenway		17.70	9100,000						
11.031 Kapaun	9/28/2007	0.41 0.41	\$275,000 \$275,000	Unincorporated		Metro	Completed		
Totals: 307.26 \$12,204,4 Total Transactions for 95 Bond Target Areas Target Area: 8	and Target A	307.26 treas Targ	\$12,204,470 get Area: 8						
TargetArea: Abernethy and Newell Creeks	Newell Cre	eks							
03.053 Evanson/TPL	8/13/2007	106.66	\$1,140,000	Unincorporated	<i>x</i>	Metro	Completed	10/18/200	
Totals: 106.66 \$1,140,000 Total Transactions for Abernethy and Newell Creeks Target Area: 1	nethy and N	106.66 lewell Cre	\$1,140,000 eks Target Ar	ea: I					
	•	O							
48.001 Berry Property 48.001A Berry Property	2/11/2008 12/31/2007	36.30 4.20	\$1,146,500 \$0	Unincorporated Unincorporated		Metro Metro	Pending Pending		
Totals: 40.5 \$1,146,500 Total Transactions for Chehalem Ridgtop to Refuge Target Area: 2	alem Ridgto	40.5 p to Refu	\$1,146,500 ge Target Are	#: 2					

53312 53344 53501 53687 53792 53872	Totals: Total Tr TargetArea:	29,001 29,002 29,004 29,005 29,006 29,007 29,008 29,011 29,012	Totals: Total Tr TargetArea:	28.003 28.004	Targe	18.030 18.033 18.041	File# Selle: TargetArea:
Knight's Bridge Lamb O'Malley Copranis Stites Schaltz	Totals: 148.82 \$14,448,750 Total Transactions for Johnson Creek and Watershed Target Area: 9 etArea: Local Share	Wong/Gilberts Ridge Spani/Seely Telford Allesina Clatsop Buttes Clatsop Buttes 2 Reeves Emmert Clatsop Stickney	Totals: Total Transactions for Columbia Slough Target Area: 2 etArea: Johnson Creek and Watershed	Multnomah C Tax Transfer OR Parks Donation	Totals: 17.283 \$345,000 Total Transactions for Clackamas River Bluffs and Greenway Target Area: 3 TargetArea: Columbia Slough	Anderson Thompson ODOT Carver Curves	Reiler Date Acres B Date Acres B Area: Clackamas River Bluffs and Greenway
3/20/2008 3/6/2008 1/17/2008 1/17/2007 7/23/2007 12/18/2007	son Creek an	6/22/2007 12/29/2006 11/27/2007 7/31/2007 7/13/2007 1/7/2008 11/30/2007 5/30/2008 7/14/2008	mbia Slough and Water	10/25/2007 12/10/2007	kamas River 3h	2/26/2008 2/27/2008 5/28/2008	Date er Bluffs an
17.10 20.18 0.79 0.71 3.94 1.11	148.82 1d Water	10.00 1.02 20.00 1.28 49.00 1.54 52.68 11.32 1.98	2 Target / shed	2.00	17.283 Bluffs aı	0.69 0.34 16.25	Acres ld Green
\$ \$ \$ \$ \$ \$ \$	\$1 <i>4,448,75</i> 0 shed Target A	\$525,000 \$240,000 \$1,200,000 \$450,000 \$5,148,750 \$260,000 \$5,850,000 \$375,000 \$400,000	\$0 \rea: 2	\$0 \$0	\$345,000 nd Greenway 7	\$5,000 \$5,000 \$335,000	Regional Bond \$ IWay
Unincorporated Milwaukie Beaverton Forest Grove Tigard	rea: 9	Portland Portland Gresham Gresham Portland Portland Portland Portland Portland Portland Portland Portland		Portland Portland	Carget Area: 3	Unincorporated Unincorporated Unincorporated	City/Jurisdiction
100000000000000000000000000000000000000		75		25		100	% Other Ownership
Clackamas NCPRD Milwaukie THPRD Forest Grove Tigard		Portland Metro Metro Metro Metro Portland Portland Portland Portland Portland Portland Portland		Metro Metro		Metro Metro Clackamas	Mgmt by
No Report Needed		Completed Completed Pending Completed Pending Pending Pending Pending		No Report Needed No Report Needed		No Report Needed No Report Needed No Report Needed	Stabilization Report
		10/18/200 10/18/200			4.		Date Completed
							Stabilization Comments:

Friday, September 05, 2008

55.002	Targe	54.001 54.006	Targe	File# 54211
55.002 Stevens	Totals: 97.12 \$1,052,500 Total Transactions for Lower Tualatin River Headwaters Target Area: 2 TargetArea: Stafford Basin	54.001 Burge Trust 54.006 Brown	Totals: 70.68 Total Transactions for Local Share Target Area: 7 TargetArea: Lower Tualatin River Headwaters	Seller Waterleaf
6/20/2008	ower Tualatin I in	5/2/2007 4/30/2007	ocal Share Tarç ıtin River Hea	Date 2/26/2008
24.70	97.12 River Head	52.93 44.19	70.68 get Area: 7 ıdwaters	Acres 26.85
\$1,800,000	\$1,052,500 waters Targ	\$808,500 \$244,000	\$0	Regional Bond \$
\$1,800,000 Lake Oswego	et Area: 2	Unincorporated Hillsboro		City/Jurisdiction \$0 Portland
				% Other Ownership 100
Metro		Metro Metro		r Mgmt by Portland
Pending		Completed Completed	,	Stabilization Report No Report Needed
		10/18/200		Date Completed
				Stabilization Comments:

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

	•		08 YTD	Program
	FY07	6/30/200	8 (2nd close)	Total
* · · · · · · · · · · · · · · · · · · ·	. <u>Amount</u>	FTE	<u>Amount</u>	<u>Amount</u>
Beginning Fund Balance	0		122,299,467	0
Resources				
Bond Proceeds	130,678,369		0	130,678,369
Interest Earnings	1,301,230		5,600,503	6,901,733
Other Resources	10,000		27,380	37,380
Subtotal Resources	131,989,599		5,627,883	137,617,483
Requirements				
Land Acquisition				
Staff Costs	117,956	4.50	206,692	324,648
Materials & Services	6,786		2,599	9,385
Land Costs	7,596,372		25,224,753	32,821,125
Due Diligence				perum angun alimpy reform men Angun alimping perumbahan
Staff Costs	0	5.00	412,029	412,029
Materials & Services	96,539		199,756	296,295
Stabilization				
Staff Costs	19,578	3.40	116,534	136,112
Materials & Services	667		181,088	181,755
Local Share	Establis de la percentar de la colonia. La complexación de la colonia de la colo			
Staff Costs	0	0.63	36,269	36,269
Materials & Services	0		25	25
Payments to Jurisdictions	400,000		4,798,366	5,198,366
Capital Grants			a. may saking miliki malaya sa sa	kirita kiloretkimologi hiloretara
Staff Costs	0	0.87	63,831	63,831
Materials & Services	0		1,400	1,400
Grant Payments	0		0	0
Capital Construction				
Staff Costs	0	0.80	84.071	84,071
Capital	455,072		1.513.347	1,968,419
Administration	Control of the control of the control of the			
Bond Issuance Costs	295,889		0	295,889
Refinement			_	,
Staff Costs	1,477		5.426	6,903
Materials & Services	382,030		85,882	467,912
Direct Admin Costs				
Staff Costs	230,815	4.75	527,644	758,459
Materials & Services	25,980		152,007	177,987
Indirect Admin Costs*	60,971		472,725	533,696
Other Requirements	Ó	ammara and a	0	0
Subtotal Requirements	9,690,132	19.95	34,084,444	43,774,576
			•	
Ending Fund Balance	122,299,467		93,842,907	93,842,907
	FY07		FY08 YTD	Total
Administration as % of Total	10.29%		3.65%	5.12%
Expenditures				

^{*} 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.