

BEFORE THE COUNCIL OF THE  
METROPOLITAN SERVICE DISTRICT

FOR THE PURPOSE OF SUBMITTING )  
TO THE VOTERS QUESTIONS OF )  
CONTRACTING A GENERAL )  
OBLIGATION BOND INDEBTEDNESS IN )  
THE AMOUNT OF \$200 MILLION AND )  
AUTHORIZATION TO PROCEED WITH )  
THE FINANCING, ACQUISITION, )  
DEVELOPMENT, OPERATIONS AND )  
MAINTENANCE OF A REGIONAL )  
SYSTEM OF GREENSPACES )

RESOLUTION NO. 92-1639A

Introduced by Rena Cusma,  
Executive Officer and  
Councilor Richard Devlin

WHEREAS, The Metropolitan Service District has taken a leadership role in identifying remaining natural areas in the region and planning for their protection or potential acquisition; and

WHEREAS, Such activities have been and will continue to be coordinated with the affected federal, state, and local governments and citizens in the region; and

WHEREAS, Numerous planning efforts, studies and recommendations have been proposed over the past 90 years to develop a system of interconnected greenspaces for the Portland/Vancouver region; and

WHEREAS, On June 28, 1990, by Resolution No. 90-1261, the Metro Council established a Policy Advisory Committee to assist the Council in coordinating its Natural Areas Planning Program and to develop a regional consensus in the development of a Metropolitan Greenspaces Master Plan; and

WHEREAS, On December 13, 1990, by Resolution No. 90-1344, Metro established a Technical Advisory Committee to assist the

Metro Council in coordinating the Metropolitan Greenspaces Program and Master Plan; and

WHEREAS, On April 29, 1992 a Metropolitan Greenspaces Master Plan Public Review Draft was released for comment through June 15, 1992; and

WHEREAS, On May 28 1992, by Resolution No. 92-1616 the Metro Council stated its intent to adopt a Metropolitan Greenspaces Master Plan; and

WHEREAS, Between April 29 and June 15, 1992 Metro staff have undertaken an extensive public involvement effort to solicit comments on the Master Plan Public Review Draft including:

1. Briefings of the governing bodies of most cities and counties and special parks districts within the Metropolitan Service District Boundary;
2. A series of five public workshops throughout the region;
3. Numerous meetings of the Metropolitan Greenspaces Policy and Technical Advisory Committees;
4. Several meetings with the Greenspaces subcommittee of the Metro City Managers organization;
5. Briefings for the State Agency Council for Growth Issues in the Portland Metropolitan Area, Metro's Regional Policy Advisory Committee, and the Metro City Planning Directors organization;
6. Numerous briefings for civic groups, neighborhood organizations educational and special interest groups.; and

WHEREAS, Significant improvements to the Metropolitan Greenspaces Master Plan have resulted from this review process; and

WHEREAS, The Metro Council adopted the Metropolitan Greenspaces Master Plan by Resolution No. 92-1637; and

WHEREAS, The Metropolitan Greenspaces Master Plan recommends that Metro seek a regional funding mechanism to assemble, through acquisition and other strategies, and develop a regional greenspaces system and also assume operations and management responsibility for components of the system in cooperation with local governments; and

WHEREAS, On July 2, 1992 the Portland Metropolitan Area Local Government Boundary Commission approved Proposal AF-4 allowing Metro to seek voter approval to acquire, develop, maintain, and operate a system of parks, open space and recreational facilities of metropolitan significance, now, therefore,

BE IT RESOLVED,

1. That the Council of the Metropolitan Service District hereby submits to the qualified voters of the District the question of contracting a General Obligation bond indebtedness of \$200 million. The bonds shall mature over a period of not more than 30 years.

2. That the voters of the District shall in the same measure consider the question of whether Metro may finance the acquisition, development, maintenance and operation of a system of parks, open space, and recreational facilities of metropolitan significance pursuant to ORS 268.312 (1)(c).

3. That the measure shall be placed on the ballot for the General election held on the 3rd day of November, 1992.

4. That the District shall cause this Resolution and the Ballot Title Attached as Exhibit "A" to be submitted to the Elections Officer, the Tax Supervising and Conservation Commission, and the Secretary of State in a timely manner as required by law.

5. That the Executive Officer, pursuant to ORS 251.285 and Metro Code Chapter 2.10, shall transmit this measure, ballot title, an explanatory statement and arguments for or against, if any, to the Secretary of State for inclusion in the State Voters' Pamphlet.

ADOPTED by the Council of the Metropolitan Service District this 23rd day of July, 1992.


  
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Jim Gardner, Presiding Officer





EXHIBIT A

Bond Measure for Resolution No. 92-1639A

Caption: Bonds to Save Green Spaces and Fund Parks System

Question: Shall Metro acquire green ways, parks, open space, wildlife habitat by issuing two hundred million dollars of general obligation bonds? If the bonds are approved, they will be payable from taxes on property or property ownership that are not subject to the limits of section 11b, Article XI of the Oregon Constitution.

Explanation: Permits Metro to acquire, develop, maintain and operate a regional system of parks, open space and recreation assets. Bonds will mature in 30 years. At least seventy-five percent of bond funds will buy and restore nature parks, trails and green ways. Up to twenty-five percent of bond funds may be used to help parks departments buy and improve local parks. Bond funds will not be used for parks care costs. Estimate of average yearly cost of bonds is 19 1/2 cents per one thousand dollars assessed value.

## STAFF REPORT

### CONSIDERATION OF RESOLUTION NO. 92-1639 FOR THE PURPOSE OF SUBMITTING TO THE VOTERS QUESTIONS OF CONTRACTING A GENERAL OBLIGATION BONDED INDEBTEDNESS IN THE AMOUNT OF \$200 MILLION AND THE FINANCING, ACQUISITION, DEVELOPMENT, OPERATION AND MAINTENANCE OF A REGIONAL SYSTEM OF GREENSPACES

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Date: June 25, 1992

Presented by: Andy Cotugno

Over the last several years Metro has led a cooperative effort to inventory, analyze, and recommend strategies to protect a significant number of remaining natural areas within the four county metropolitan area. After an inclusive plan development process, and extensive public review, the draft Metropolitan Greenspaces Master Plan recommends that Metro acquire land and, as appropriate, assume operations and management responsibilities for a regional greenspaces system and recommends that a general obligation bond or other funding source be pursued by the Metro Council to fund acquisition of the greenspaces system and associated capital improvements.

Through adoption of Resolution No. 92-1616 the Council took preliminary steps to implement these recommendations. Resolution No. 92-1616 requests the Portland Metropolitan Area Local Government Boundary Commission to allow Metro to seek voter approval to exercise District authority to "acquire, develop, maintain, and operate a system of parks, open space, and recreational facilities of metropolitan significance" pursuant to ORS 268.312(1)(c). It also requests a tax coordination public hearing before the Multnomah County Tax Supervision and Conservation Commission as required by ORS 294.655 and 1991 SB 1185 prior to the District seeking voter approval of a general obligation bond to assist in financing assembly of a regional greenspaces system.

Resolution No. 92-1639 accomplishes two things:

1. It would refer for voter action authorization for the District to exercise its powers pursuant to ORS 268.312(1)(c); and
2. It would refer a general obligation bond indebtedness question to finance acquisition and capital improvement of the regional greenspaces system to the voters of the District for the November general election.

The Metropolitan Greenspaces Policy Advisory Committee, established by the Metro Council through Resolution 90-1261, recommends that a \$200 million general obligation bond request be referred for voter approval at the November election. The attached "Metropolitan Greenspaces Program Financial Study" provides a financial analysis of the bond measure and its implications for the District. A recommended ballot title is attached as Exhibit A to Resolution No. 92-1639.

**EXECUTIVE OFFICER'S RECOMMENDATION**

The Executive Officer recommends adoption of Resolution No. 92-1639.

***METROPOLITAN  
GREENSPACES PROGRAM***

***FINANCIAL STUDY  
METROPOLITAN SERVICE DISTRICT***

*July 1992*

***Public Financial Management, Inc.  
1300 SW Fifth Avenue, Suite 2929  
Portland, OR 97201***

# METROPOLITAN GREENSPACES PROGRAM

## FINANCIAL STUDY

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# METROPOLITAN GREENSPACES PROGRAM FINANCIAL STUDY METROPOLITAN SERVICE DISTRICT

## INTRODUCTION

The following report has been prepared by Public Financial Management, Inc. ("PFM") to assist in the process of examining the financial implications of the Metropolitan Services District's ("Metro") Metropolitan Greenspaces Program (the "Program"). The Program is in its early stage, and much of the basic information related to which lands will be most suitable for protection, which portion should be acquired and at what cost, is not yet available. Consequently, the financial results presented in this report are based on preliminary information prepared by Metro staff and on assumptions made by PFM. Nonetheless, this report, and the computer model that accompanies it, are intended to provide a basis for moving ahead with the Program.

In the course of preparing this report, PFM has developed a computer financial model, which it has provided to Metro with the delivery of this report. The model is designed to allow Metro staff to modify assumptions about acquisitions, acquisition costs, timing and sources of financing for initial capital and land acquisitions and ongoing costs. Additionally, the model presents the tax rate impact resulting from several alternative general obligation bond issuances to finance greenspaces capital improvements and land acquisition.

## GREENSPACES INVENTORY AND VALUATION

According to the inventory and site mapping performed by Metro in 1989, approximately 109,000 acres of the region's land has been identified as existing natural areas in the Oregon component of the Program. Of the total 109,000 of natural area acres, approximately 9,200 are in public ownership. Nearly half of that total is located in Forest Park. It is the remaining acreage of natural areas that provide the pool of lands considered for protection under the Greenspaces Program.

### Regionally Significant Large Acre Sites

The Greenspaces Master Plan identifies certain large acre sites throughout the region that have been designated as regionally significant open space protection areas. It is assumed that these sites would not require restoration and would be primarily reserves and additions to existing parks and reserves. Use of these areas would be to provide and protect open space and for passive recreational activities, such as hiking, bicycling, backpacking, bird watching, and canoeing.

### *Acreage*

Metro staff has prepared preliminary information on the acreage and dollar value of the regionally significant large acre sites and the park inventory that could be included in the Greenspaces Protection Program. The total acreage equals 9,962. Within Multnomah County 3,125 acres have been identified as regionally significant large acre sites. In Washington County 3,140 acres have been identified, and 3,697 acres have been identified in Clackamas County.

### *Value*

For financial planning purposes, the cost of the most important regionally significant large acre sites, in today's dollars, has been estimated at the tax-assessed value of the land. Total tax-assessed value of regionally significant large acres sites is estimated at \$173,686,000. PFM believes that tax-assessed value figures offer the best estimate of land values presently available. With the reassessment of land throughout the state that occurred since the passage of Ballot Measure 5, assessed values in the Metro region are assumed to be close to market values. All actual acquisitions would be subject to a specific appraisal which may or may not agree with the tax-assessed value.

Metropolitan Service District  
Greenspaces Financial Study

The table below lists areas that have been identified as regionally significant large acre sites. The list of large acre sites in the Greenspaces Master Plan is under final review. This list may or may not agree with the Master Plan list.

**METROPOLITAN GREENSPACES LARGE ACRE SITES**

	Acres	Value
<b>MULTNOMAH COUNTY</b>		
Boring Lava Domes	750	
Burlington Bottom	250	
Columbia Shoreline	300	
Fairview Headwaters	150	
Forest Park Inholdings	500	
Heron Lakes	50	
Island Reserves	500	
Kelly Butte East Slope	25	
Ross Island	50	
Sandy River Gorge	500	
Tryon Creek Linkages	50	
Total - Multnomah County	3,125	\$49,664,000
<b>CLACKAMAS COUNTY</b>		
Beaver Lake	250	
Boring Lava Domes	750	
Canemah Bluffs	250	
Finley Nature Reserve	12	
Holcomb Trail Ruts	50	
Island Reserves	50	
Milwaukee Waterfront	25	
Mt. Talbert	200	
Newell Creek Canyon	500	
Pete's Mountain	500	
Rock/Sieben Creeks	250	
Scenic Clackamas River	250	
Sentinel Tree	250	
Tryon Creek Linkages	50	
Tualatin River Access	60	
Willamette Narrows	250	
Total - Clackamas County	3,697	\$51,168,000
<b>WASHINGTON COUNTY</b>		
Bull Mountain	100	
Cedar Mill Wetlands/Forest	150	
Cooper Mountain	250	
Council Creek	500	
Fanno Creek Greenway	100	
Gales Creek	500	
Hagg Lake	250	
Hedges Creek	100	
McKay/Dairy Creek Confluence	250	
Rock Creek	100	
Rock Creek Wetlands	100	
Tonquin Geological Area	500	
Tualatin River Access	240	
Total - Washington County	3,140	\$72,854,000
<b>Total Large Acres Sites</b>	<b>9,962</b>	<b>\$173,686,000</b>

Notes:

1. Sites are not listed in priority order.
2. The acreage associated with each site is an approximation based on the type and characteristics of each site. Actual acreage protected or acquired by the Greenspaces Program may vary substantially from this list.

### *Large Acre Site Priorities*

The Greenspaces Master Plan contains criteria that will be used to prioritize sites for acquisition from the Master Plan list during the acquisition phase of the program. Other factors that can influence the timing and order of acquisition include availability, price, and local conditions. Additionally, the funds available for operations and maintenance of lands will affect priorities and how particular lands are ranked.

### *Large Acre Site Capital Improvements*

At certain funding levels, it may be desirable to allocate funds to large acre sites for the construction of capital improvements. Improvements could include parking areas, camping areas, restrooms and interpretative centers.

### **Restoration Site Protection**

Certain priority open space acquisitions would be of sites requiring restoration to former natural area status. These areas are likely to be closer to historically urban areas of the region and may be impacted by former or approximate industrial use.

### *Acreage*

The Greenspaces Master Plan identifies several restoration site opportunities. The identified restoration sites total 300 acres, and are entirely located within Multnomah County. The site names and estimated sizes are shown in the table below. These sites are not in order of priority.

<b>RESTORATION SITES</b>	<b>Acres</b>	<b>Value</b>
Four Corners	100	
Johnson Lake	25	
Little Four Corners	25	
North Peninsula	50	
Restoration opportunities	100	
<b>Total</b>	<b>300</b>	<b>\$15,625,000</b>

### *Value*

The cost, in today's dollars, of the most important regional restoration sites has been estimated at the tax-assessed value of the land. Total tax-assessed value of priority restoration sites is estimated at \$15,625,000.

### *Restoration Site Priorities*

Priority criteria shown in the Master Plan will be used to prioritize restoration opportunities. Other factors that can influence acquisition include availability, price, and local conditions.

### *Restoration Site Capital Improvements*

Capital improvements in the form of clean-up, re-vegetation, excavation, or construction will be required to return restoration sites to a natural state. The allocation of capital improvements for this activity varies according to bond size.

### **Trail Acquisition**

A significant feature of Greenspaces program activity will involve acquisition of title and right-of-way for lands to create trails and trail corridors. Trail use would include hiking, running, equestrian use, and cycling. In many cases, the Greenspaces funds would be used to add to or complete existing trail corridors. The allocation for this activity varies according to bond size.



### *Acreage*

The Greenspaces Master Plan identifies regionally significant trail corridors and areas. The trail areas amount to 1,490 acres located on 245 linear miles.

### *Value*

The value of land associated with trail systems throughout the Metro region have been estimated at a value of \$35,747,000.

### *Regional Trail Priorities*

At this time, a priority schedule associated with particular regional trail acquisitions is under development.

### *Trails Capital Improvements*

All trails for whatever use will require certain capital improvements. High-use urban trails would be paved to enhance cycling use and prevent deterioration from heavy use. Natural and gravel trails would require basic trail maintenance, bridging, and other improvements. The allocation of funds for this activity varies according to bond size.

### **Local Government Share**

The Greenspaces Master Plan provides that a portion of Greenspaces general obligation bonds will be allocated to a local government for use on local greenspaces, parks, and recreation priorities. For the purpose of this report, it is assumed that the local government share will be 25% of net bond proceeds (after deducting the costs of issuance). Expenditure of these funds is under local governmental control to the extent that such expenditures conform to legal requirements. The local share funds must be used in conformance with the three general areas cited below.

- 1. Adherence to federal tax laws related to the issuance and expenditure of federally tax-exempt bonds and related Metro resolutions and ordinances.** As outlined later in the report, the Tax Reform Act of 1986 places controls on the expenditure of federally tax-exempt bond funds. Issues such as arbitrage rebate requirements and draw-down provisions will require continual tracking of the spend-down of bond proceeds and the investment earnings on those proceeds. In addition to federal tax law, resolutions and ordinances adopted by Metro pursuant to bond issuance are likely to contain provisions stipulating the establishment of special funds and the use of trustees that will affect the administration of bond funds.
- 2. Adherence to the stipulations and language included in the ballot measure authorizing Metro to issue the bonds.** Metro will be required to ensure that the specific language included in the ballot measure passed by the voters authorizing issuance of the bonds and the subsequent levy for debt service is adhered to in the expenditure of bond proceeds.
- 3. Adherence to restrictions in expenditures associated with Ballot Measure 5.** Property tax levies for debt service on voter-approved general obligation bonds are not included in the \$10 governmental rate imposed by Measure 5. There are, however, restrictions imposed by Measure 5 on the uses of general obligation bond proceeds which will need to be adhered to by the local government participating in the local share program.

Because of Metro's requirement to adhere to the requirements above, it would be appropriate to develop intergovernmental agreements for each local government project expenditure. For proper control, it will be necessary for Metro to hold the funds until project expenditures occur. It may be preferable for Metro to administer the program on a reimbursement basis.

As mentioned, the local share program is assumed to be funded by 25% of the net proceeds of the Metro bond issues. The Greenspaces Policy Advisory Committee has recommended that the local share be allocated among the three counties on the basis of assessed market values within Metro boundaries. Each county is expected to develop an allocation between cities and the County and present its allocation scheme to Metro. The allocation to counties assuming a \$200 million bond issue, \$37,000,000 in investment income and \$59,249,000 local share, is shown below.

COUNTIES	Assessed Value	Allocation
Multnomah	\$23,051,325,291	\$29,745,000
Clackamas	8,982,131,950	11,590,000
Washington	13,883,109,527	17,915,000
Total	45,916,566,768	\$59,250,000

#### Other Greenspaces Program Cost Elements

Certain other costs associated with the issuance of general obligation bonds and the subsequent acquisition program have been assumed and are described below.

##### *Issuance Costs*

These costs include underwriters discount, legal fees, financial advisory fees, printing costs, and related costs of issuance. It is assumed that bond issuance costs will equal 1.25% of total bond proceeds.

##### *Cost of Transactions*

Acquisition administration will involve a variety of activities including research on property ownership and availability, negotiation with property owners, research on the tax implications of certain property transfers, hazardous materials inspections, engineering studies, title research, and other required technical work. Transaction costs will include the costs of project management staff, legal services, real estate closing costs, and the costs of other required professional services. To the extent that seller represented realtor costs are included in the purchase of land, it is assumed for the purposes of this report that those costs would be included in the land price.

On the basis of information gathered by Metro from other open space program operators, it is assumed that these costs will range from 10% to 12% of the cost of acquiring land.

**Total Value and Resource Allocation**

The total value of the Greenspaces Program is shown below. As shown, it is estimated that a bond size of approximately \$462 million would be needed to fund the entire program. The costs presented in the table below assume that the acquisition phase of the Program takes place over five years and that the value of land is inflated over that time. The table also assumes interest earnings of approximately \$92 million, which are directed to each of the Program uses on the basis of an allocation scheme discussed below.

BOND SIZE	TOTAL PROGRAM	
<b>Sources</b>		
Bond Proceeds		\$462,620,000
Interest Earnings		92,098,000
<b>TOTAL SOURCES</b>		<b>554,718,000</b>
<b>Uses</b>		
	Allocation	
Costs of issuance	1.25%	\$5,782,750
Remaining sources		548,935,250
Local government share	25.00%	137,233,813
Regional share	75.00%	411,701,438
	<b>%Regional Share</b>	
Transaction costs	12.00%	49,404,173
Large acre acquisition	60.00%	247,020,863
Large acre capital improvement	5.00%	20,585,072
Restoration acquisition	4.00%	16,468,058
Restoration capital improvement	3.00%	12,351,043
Trails acquisition	11.00%	45,287,158
Trails capital improvement	5.00%	20,585,072
<b>TOTAL USES</b>		<b>554,718,000</b>

It is assumed that full funding for the entire Program will not be immediately available. Consequently, the uses of Program financial resources will be partially dependent on the magnitude of resources available. For the purposes of this report, a system has been developed that allocates resources to program categories according to bond size. As shown in the table on the next page, these allocations favor land acquisition over capital improvements. Under larger bond size alternatives, the relative allocation to capital improvements increases.

It is important to note that investment earnings during Program implementation are expected to play an important role in Program implementation. Investment earnings will act to reduce the impact of inflation on Program costs as acquisitions and other expenditures occur over time.

On the basis of on financial analysis by Metro staff and PFM, it appears that full funding of the Program would require a bond issue of approximately \$462 million. Therefore, the following table presents the maximum issue size as well as smaller bond issue sizes.

Metropolitan Service District  
Greenspaces Financial Study

	TOTAL PROGRAM		\$250 Million		\$200 Million		\$150 Million		\$100 Million	
<b>Sources</b>										
Bond Proceeds	\$462,620,000	\$250,000,000	\$200,000,000	\$150,000,000	\$100,000,000					
Interest Earnings	92,098,000	46,000,000	37,000,000	27,000,000	18,000,000					
<b>TOTAL SOURCES</b>	<b>554,718,000</b>	<b>296,000,000</b>	<b>237,000,000</b>	<b>177,000,000</b>	<b>118,000,000</b>					
		Allocation	Allocation	Allocation	Allocation					Allocation
<b>Uses</b>										
Costs of Issuance	1.25%	\$5,782,750	\$3,125,000	\$2,500,000	\$1,875,000					1.25%
Remaining sources		548,935,250	292,875,000	234,500,000	175,125,000					116,750,000
Local government share	25.00%	137,233,813	73,218,750	58,625,000	43,781,250					25.00%
Regional share	75.00%	411,701,438	219,656,250	175,875,000	131,343,750					75.00%
		%Regional Share	%Regional Share	%Regional Share	%Regional Share					%Regional Share
Transaction costs	12.00%	49,404,173	26,358,750	21,105,000	15,761,250					12.00%
Large acre acquisition	60.00%	247,020,863	136,340,634	113,492,138	90,023,006					71.74%
Large acre capital improvement	5.00%	20,585,072	8,786,250	5,276,250	2,626,875					1.19%
Restoration acquisition	4.00%	16,468,058	9,730,772	7,861,613	5,957,931					4.48%
Restoration capital improvement	3.00%	12,351,043	5,491,406	3,517,500	1,313,438					0.60%
Trails acquisition	11.00%	45,287,158	24,162,188	19,346,250	13,134,375					8.49%
Trails capital improvement	5.00%	20,585,072	8,786,250	5,276,250	2,626,875					1.50%
<b>TOTAL USES</b>		<b>554,718,000</b>	<b>296,000,000</b>	<b>237,000,000</b>	<b>177,000,000</b>					<b>118,000,000</b>

## FINANCING PLAN

### Means of Land Acquisition and Acquisition Management

In the course of acquiring lands for the Program, it is likely that Metro will utilize various means to secure the rights to land. This will include outright purchase of the title to land, as well as methods that do not include land ownership, but insure preservation of the character of the land as open space.

#### *Outright Land Purchases Through Professional Realtors*

It is assumed that certain open space areas would be purchased by Metro directly through its own efforts. There is likely to be a major role for the services of outside professional services that possess expertise in land acquisition programs such as that envisioned. The advantages of using outside professional services is threefold: 1) such individuals have the skills and knowledge in the land acquisition process; 2) outside professionals have a sense of the real estate market and access to current information on land availability; and 3) Metro can employ the services of these individuals under contract. These services are paid for through the land acquisition process, and are therefore a cost of the Program that can be paid through general obligation bond proceeds.

In order to avoid confusion among the professional service providers, Metro may find it beneficial to contract with particular outside professionals to represent Metro, either on an hourly basis or a contingent fee basis. In either case, the nature of compensation between Metro and the contract professionals will be clearly specified in advance of the Program commencing. Establishing relationships with particular outside professionals will help avoid confusion in the real estate community and clearly establish Metro's objectives and procedures for land acquisition.

#### *Purchase Through a Non-Profit Land Preservation Organization*

An increasingly important means for acquiring land for the public benefit is through non-profit land preservation organizations. There are currently approximately 900 such organizations in the United States that have been involved in the protection of approximately 2.7 million acres of land. Although most of these organizations are small and community-based, there are a handful with a national focus. These include the Trust for Public Land, the Nature Conservancy, the Conservation Fund and the American Farmland Trust. In the course of this project PFM and Metro staff have met with representatives of the Trust for Public Land ("TPL") to determine the possible role for the Trust within the Program.

TPL and other similar organizations are able to secure land at below market rates as a result of the favorable tax benefits that accrue to land sellers. If managed effectively, these organizations operating on behalf of Metro could function as adjunct staff, identifying attractive land acquisition opportunities and working directly with property owners on particular land acquisitions.

When a property appropriate for the Program has been identified for acquisition, a land preservation organization, if it were involved, would initiate negotiations with the landowner. An independent appraisal on the property would be obtained at this point in the process and the results reviewed by Metro staff. If, through the course of negotiations the land clearly fits within the cost and functional parameters of the Program, the organization would proceed with the acquisition at a price not to exceed the market value established by the appraisal. After the acquisition of the land, Metro would purchase the land from the organization at a price not to exceed the appraised value. The costs of the organization (appraisals, legal and environmental costs, staff time, closing costs, etc.) would be included in Metro's acquisition cost of the land. In other words, the land preservation organization will recoup its costs in the spread between the price paid to the landowner and the cost to Metro. Even after including the costs of the transaction and fee to the land trust, it may be possible for Metro to acquire land at below market rates through this process as a result of the tax benefits to the landowner from selling at a price below market. Once again, in no case would Metro be required to purchase the land at a price in excess of the appraised value. Since the land preservation organization's transactions costs would be included in the purchase price paid by Metro, use of such an organization would reduce the expenditures by Metro associated with acquisition administration.

The advantages of working with a land preservation organization include the expertise that these organizations have developed in acquiring lands for public benefit. For example, TPL has acquired over 500 thousand acres valued at nearly \$600 million, in the United States. The approach developed by land preservation organizations over the years could benefit the Program, particularly in its early phases. Metro staff could benefit from training by organization employees in the tax advantages of selling at below market rates to public agencies, the techniques for identifying and approaching landowners, and legal elements of land transfer. It may also be worthwhile to develop a relationship with one or more land preservation organizations because some landowners simply may not wish to deal directly with government, for whatever reason. In such cases, a land preservation organization can essentially act as an intermediary that handles the land purchase, then turns the land over to Metro at a price not to exceed the appraised value.

### *Conservation Easements*

In some cases, Metro may be able to accomplish the goals of preserving land as greenspace without having to acquire title to the land. For example, a conservation easement can be obtained as a result of an agreement between a landowner and a public entity (in this case, either Metro or a land trust) that limits the development rights on the property. The easement itself attaches to the deed on the land and defines the future uses of the land in perpetuity. The landowner continues to own the land, but the development restrictions placed on the property are recorded on the deed to the land. Conservation easements may either be donated or sold by the landowner. In the case of sale of the easement, the cost could be a small fraction of the cost of outright purchase.

Financial benefits to the landowner offering a conservation easement are twofold: 1) the Internal Revenue Service recognizes that the transfer of development rights reduces the value of the land asset, and the value of that reduction can be written off on the landowners federal income taxes; 2) the value of the land has been reduced as a result of the easement and will be recorded as such for local property taxation purposes. Since the easement operates in perpetuity, the value of the land has been permanently reduced since possible uses have been restricted.

Conservation easements are an effective means of retaining property as a scenic backdrop. In such a case, public access may be limited to the protected property, but the natural qualities of the land will not be compromised by future development. Conservation easements can be drafted, however, to allow for public access through use of a trail easement or other mechanism set forth in the legal documents establishing the easement. The conditions established under a conservation easement are as broad as the parties to the agreement wish to make them.

### *Donations and Bequests*

It is possible that Metro could be the recipient of open space land acquired through donations or bequests. Either Metro or a Greenspaces nonprofit foundation could accept donations and bequests and include such land in the open space system. Financial donations or bequests could also be used for acquisition or maintenance of the system depending on the terms of the gift.

### **Program Schedule**

Since the Program may ultimately involve acquiring or protecting more than 10,000 acres, it is reasonable to expect that the acquisition process will require several years to implement. Identifying regionally significant greenspace land, initiating negotiations with landowners, coming to terms and obtaining the land will take time for each individual parcel.

It is assumed that the actual acquisition process will follow approval of a ballot measure authorizing Metro to finance the Program through issuance of general obligation bonds. The vote is scheduled for November, 1992. Until then, existing Metro staff will focus on the preliminary planning efforts and estimating the ultimate size and schedule for the Program. As discussed in this report, additional Metro staff required specifically for the acquisition of land will not be hired until after voter approval.

**Bond Issuance Schedule and Sizing**

In performing its financial analysis, PFM has assumed that the costs associated with acquisition of Program land will be financed with general obligation bonds. General obligation debt is not a means of paying for on-going operating costs. It is, however, appropriate for paying for capital improvements and land acquisition.

Metro has the authority (under ORS 268.520 (1)) to issue general obligation bonds supported by property taxes. The limit on the amount of general obligation bonds that may be outstanding is 10% of the true cash value of all taxable property in the District. Based on the assessed value of Metro for fiscal year 1992 (\$45,916,555,768) Metro is authorized, subject to voter approval, to issue up to \$4,591,655,577 in general obligation debt. The credit market limit is much lower than this and depends on the overall property tax burden to the property owners within Metro.

Assuming 4% inflation in assessed value over two years and a 30-year level debt service bond issue at 7.0%, a levy of .1623 cents per \$1,000 of assessed value would produce \$1,000,000 in bond issue principal. This means, for example, that a \$100,000,000 bond issue would require a levy of approximately \$.1623 per \$1,000 of assessed value. For a \$100,000 house, a \$100,000,000 bond issue would result in an annual addition to property taxes of approximately \$16.23.

It is assumed for the purposes of this analysis that Metro will issue bonds for the full amount authorized soon after a successful ballot measure. Interest earnings over time on bond proceeds will ensure that Metro maintains purchasing power consistent with inflationary increases in land value.

It is assumed that thirty year bonds would be issued at 7.0% interest.

The table below shows relevant financial information for five different bond sizing alternatives.

Bond Issue Amount	Interest Income	Total Sources	Maximum Annual Debt Service(1)	Initial Tax Levy/\$1,000(2)	Average Tax Levy/ \$1,000(3)
\$462,000,000	\$92,000,000	\$554,000,000	\$37,231,000	\$0.7497	\$0.4490
\$250,000,000	\$46,000,000	\$296,000,000	\$20,146,000	\$0.4057	\$0.2432
\$200,000,000	\$37,000,000	\$237,000,000	\$16,117,000	\$0.3254	\$0.1945
\$150,000,000	\$27,000,000	\$177,000,000	\$12,088,000	\$0.2434	\$0.1459
\$100,000,000	\$18,000,000	\$118,000,000	\$8,058,000	\$0.1623	\$0.0972

(1) Maximum annual debt service over 30 year life of bonds.

(2) Tax levy in first year after issuance, assumed to be 1994. First year levy reflects two years of growth in Metro's assessed value at 4% annually.

(3) Average levy over life of bonds. Assuming \$45,916,555,768 as the total assessed value for the Metropolitan Service District and 4% annual growth in assessed value.

On the basis of this analysis, to maximize funds available for Program objectives, it is recommended that Metro issue most of the bonds in a lump sum. This approach will enhance investment earnings on the Program's bond proceeds, and those investment earnings will be applied to Program acquisitions and capital. In effect, investment earnings will act as a means of maintaining the purchasing power of the Program as inflation grows over time.

**Impact of the Tax Reform Act of 1986 on Program Land Acquisitions**

The Tax Reform Act of 1986 had profound impacts on the ability of local government's to issue tax-exempt debt for a variety of purposes. In general, the Act made it more difficult for governments to retain the tax-exempt status on debt if the ultimate use of the proceeds of that debt substantially benefitted private individuals or entities. It is possible that circumstances may arise in the course of the Program that will require careful examination in light of the Act.

For example, assume Metro identified a 50 acre parcel of land, half of which was well-suited for inclusion in the Program. Therefore, only 25 acres of the 50 would be suitable for acquisition through the Program. There are likely to be cases when the landowner will only be willing to sell the parcel in total. In such a case, Metro will own land that will not be well-suited for the Greenspaces Program (for example, large tracts of farm land) but may be attractive for other uses, like development. Under the Act, the tax-exempt status of the bonds issued for Program land acquisition would be endangered if Metro were to acquire land using tax-exempt proceeds then turn around and sell some of that land to private interests. The Act also affects the use of concessionaires and private operations that may take place on the publicly acquired land. The following is a brief description of some of the key elements of the Act.

The Act established two primary types of bonds for tax purposes: governmental purpose and private activity. If bonds are governmental purpose, then there are few restrictions and they are fully tax-exempt. If the bonds are private activity, then only certain types of bonds may be tax-exempt (for example, land acquisitions related to a qualified redevelopment activities fall into this category) and these are subject to many further restrictions or provisions (for example, the Alternative Minimum Tax "AMT").

To retain the governmental purpose classification necessary to finance using tax-exempt bonds there are several hurdles.

- \* *Ownership:* The facility or asset must be governmentally owned.
- \* *Operation:* The facility or asset must be governmentally operated or operated under a management contract (including with non-profit organizations) which conforms to the federal definition of a "qualified management contract."
- \* *Use Test and the Debt Service Payment Test:* There are two tests to determine governmental purpose, if the two conditions listed above are satisfied. If either of the following two tests indicate a "governmental purpose", then the bonds will be governmental purpose bonds. Note that only one of the following two tests need to be satisfied in order to achieve governmental purpose status.

*Use of the Facility ("Use" Test):* The primary users must be the general public. If one organization has preferential treatment which exceeds 10% of the facility's use (legal counsel can provide full detail on the calculation of the 10% use), or if preferential treatment of private users exceeds 10% in combination, then there is private use and the bonds are no longer governmental purpose unless the following test is met:

*Debt Service Payment Source ("Security Interest" or "Private Payment" Test):* This test is met if the source of payment for the bonds does not derive from private users by greater than 10% (the formula is more complicated, but this is a useful simplification.) Indeed, some users are restricted to 5% and the total 10% limit is cumulative for all private users. In the case of the Program, since the bonds would be repaid through property taxes, Metro would not have a problem meeting the security test.

#### *Concession/Parking Options*

If the government owns the concession stand or parking facility and uses a qualified management contract with a private operator, the stand or garage does not count toward the 10 percent limitation. The parking garage must make its spaces generally available; there can be no assigned spaces to outside users. Parking must be operated on a first-come, first-served basis and only month-to-month contracts will be allowed.

If a private entity owns and operates the concession stand, any bonds issued for construction or acquisition of the facility or asset would be governmental purpose if the aggregated private use (concession stands plus any other private use) do not exceed 10% use or payment on debt service.



### *Qualified Management Contracts*

The Tax Act specifically allows the private operation of certain functions at governmentally-owned facilities financed with tax-exempt bonds. Those functions include the operation of cafeterias, lounges, food service, and parking areas. In order to issue tax-exempt debt for a governmentally-owned asset that will be operated by a private entity, the contract with that private entity needs to meet each of the following conditions.

- 1) The term of the management contract cannot exceed 5 years (including renewal options).
- 2) The governmental unit owning the facility may terminate the contract without cause and without penalty at the end of three years.
- 3) Fees provided to the private facility manager may not be based on a share of the profits of the asset.
- 4) At least 50% of the fees provided to the private facility manager must be on a fixed fee basis.

### *Impact on Timing and Structure of Bond Issues*

Earlier in the report PFM describes the benefits of a lump sum bond issue. This approach may not be advisable if there is a likelihood that some portion of the bonds will not qualify as governmental purpose debt. A worst case scenario would emerge if the bonds were issued in one lump sum and ultimately a portion of that debt were used for non-qualified purposes. This could result in the entire issue being declared subject to federal income taxes by the Internal Revenue Service and massive financial losses to the holders of Metro's bonds. In order to prevent this situation, a phased bonding program in which bonds were issued for particular (and potentially taxable of private activity) land acquisitions may be more appropriate. The issue of tax-exemption and Program timing will need to be examined further with Metro's bond counsel.

### **Property Tax Limitation Measure**

On November 6, 1990, Oregon voters approved Ballot Measure 5, (now Article XI, Section 11b, of the Oregon Constitution), which imposes a 1.5% limitation on property taxes as well.

Beginning fiscal year July 1, 1991, taxes imposed on property are separated into two categories: one category dedicates property tax revenues raised to fund the state's public school systems defined as "educational services, including support services, provided by some unit of government, at any level from pre-kindergarten through post-graduate training"; and one which "dedicates revenues raised to fund government operations (e.g., cities, counties, special districts, metropolitan service districts) other than school systems."

Beginning in fiscal year 1991-92, property taxes for non-school government operations are limited to \$10.00 per \$1000 of Real Market Value (RMV). All local governments which levy a property tax will be required to share the \$10 per \$1000 of RMV limitation on each property.

### *Exemptions from Property Tax Limits*

Sections 11b (3a) and (3b) of Ballot Measure 5 specifically exempt taxes imposed to pay principal of and interest on bonded indebtedness provided bonds are: 1) authorized by a specific provision of the Oregon Constitution, or 2) are approved by the voters of a government unit and offered as general obligations for "capital construction or improvements." Capital construction and improvements are not defined in the measure itself, but are defined in the recently approved legislation.

Ballot Measure 5 defines exempt local improvements to be capital construction projects which:

- "provides a special benefit only to specific properties or rectifies a problem caused by specific properties;" and
- "the costs of which are assessed against those properties in a single assessment upon completion of the project;" and
- "for which the payment of the assessment ... may be spread over a period of at least ten years."

*Recently Approved Legislation*

The 1991 Oregon Legislative Assembly adjourned on June 30, 1991, having spent much of the session addressing Ballot Measure 5. The key bill addressing the statutory implementation of Ballot Measure 5 is HB 2550, which was approved by the Legislature and signed into law by the Governor on June 30. The law took effect September 29, 1991.

- House Bill 2550 - Prescribes the overall tax assessment, administration and collection methods and procedures to conform to the tax limitations and requirements of Ballot Measure 5. Defines key terms including "Real Market Value," "Exempt Bonded Indebtedness," "Capital Construction" and "Capital Improvements."

Section 210 (14c) exempts general obligation indebtedness issued after November 6, 1990 which is voter approved and used for capital construction or improvements.

Section 210 (17-19) defines capital construction and improvements to include all activities related to the construction, modification, replacement, repair, remodeling and renovation of structures which have a useful life of over one year; the acquisition of land, or legal interest in land, in conjunction with the capital construction of a structure; the acquisition and installation of machinery, equipment, furnishings and equipment which have a life of over one year; and activities related to capital construction such as planning, design, studies, permits, and acquisition of financing. Structures are defined as any temporary or permanent building or improvement to real property of any kind which is constructed on or attached to real property, whether above, on or beneath the surface.

**Evaluation of Credit Impact from Greenspaces Program**

The credit markets and bond rating agencies recognize that governmental issuers have a finite capacity to issue debt supported by the wealth of the community. This is termed a jurisdiction's debt capacity. In the course of the report PFM has performed a preliminary evaluation of Metro's capacity to issue general obligation debt in the magnitude envisioned.

The following table compares Metro's current and prospective debt position to national medians of debt capacity compiled by Moody's Investors Service. The table identifies two measures of debt capacity: debt per capita and debt as a percent of market value of taxable property. These two measures have been calculated based on Metro's present debt position (including all tax-supported debt issued by underlying jurisdictions), as well as based on the assumption that additional debt, ranging from \$150 million to \$250 million, is issued.

Metropolitan Service District					Moody's Medians					
	Current	Current Plus	Current Plus	Current Plus	Cities Over 500,000			Counties Over 1,000,000		
	Direct Debt	\$150 Million	\$200 Million	\$250 Million	Low	Median	High	Low	Median	High
Debt Per Capita	\$554	\$677	\$718	\$759	\$647	\$1,169	\$4,245	\$479	\$1,069	\$2,073
Debt as a % of AV	1.47%	1.79%	1.90%	2.01%	1.50%	4.00%	12.50%	0.70%	2.50%	5.70%

In the case of both measures of debt capacity, Metro is well below the national medians, even when assuming an additional \$250 million in debt. For debt per capita, Metro would face a debt per capita level of \$759, compared to a level of \$1,169 for cities with populations of more than 500,000 and \$1,069 for counties with populations greater than 1,000,000. With respect to debt as a percent of market value of taxable property, at the maximum Program financing level this ratio reaches 2.01%, compared to median city and county ratios of 4.00% and 2.50%, respectively. Consequently, by virtue of its large population and assessed value base, Metro appears to have extensive capacity for issuance of property tax-supported debt. Nonetheless, a Program of the magnitude envisioned will require close contact and communication about Metro's credit position with representatives of the rating agencies and investment community.

### Impact on the Property Tax Collections of Local Governments

One of the impacts of the Program will be the removal of large tracts of property from the property tax rolls. This will affect all of the municipalities collecting property taxes. PFM has, based on preliminary information, prepared an estimate of the assessed value of regionally significant land within the three metropolitan Portland counties. The table below presents that estimate.

County	FY 1992 Tax Assessed Value	Program Land	Percent of Total
Clackamas County	\$12,429,965,230	\$51,168,000	0.41%
Multnomah County	23,326,062,673	65,289,000	0.28%
Washington County	15,014,277,579	72,854,000	0.49%

The percent of assessed value of potential Program land to total assessed value based on current value and acquisitions projected ranges from .28% for Multnomah County to .49% for Washington County. To the extent that property tax rates in affected areas are below \$10 per thousand, revenues will not be lost, but the rate to taxable properties would be slightly higher, as some land is taken off the property tax rolls. Analysis exists, however, indicating that protection of open space areas can have a positive influence on property values in close proximity to protected areas. This would lessen the effect of removing open space areas from property tax rolls.

### GREENSPACES OPERATION PROGRAM

#### Cost of Operations

The Program involves much more than simply issuing general obligation bonds. In fact, the acquisition phase is just the first step in a long-term process of Program management. As indicated, there are two key elements to the financing of the Program. One, the acquisition and capital improvements component, has been discussed above. The second is the cost of ongoing operation and maintenance of the acquired lands and the costs of Metro staff designated to manage the land. As mentioned above, general obligation bonds can be legally used for land acquisition, but not for operations and maintenance.

In order to estimate operations and maintenance costs, Metro staff and PFM have surveyed other open space districts around the country. On the basis of the information received in the survey, the following schedule of annual costs on a cost per acre basis (with the exception of trails, which are presented on a cost per linear mile basis) has been developed. Basic maintenance costs assume that the land would be purchased and developed for passive, if any, recreational use. Estimates of annual maintenance for a landscaped park are as high as \$2,400 per acre.

Alternatively, if a funding source is not identified for the Greenspaces operations (see discussion under section -- Revenue Sources for On-Going Operating and Capital Needs) it may be necessary to "land bank" acquisitions and develop the sites for use at a future date while relying on volunteer efforts from "friends groups" to make land available for limited use. It is assumed, under the land banking scenario that the annual operating cost per acre for all acquisition categories would be \$35. The projected costs under the limited maintenance and land banking scenarios are shown in the table below and illustrated in the graph on the following page.

The computer model developed by PFM uses information on per acre operating costs to forecast future operating costs. At this point, cost estimates related to both capital and operating costs are based on preliminary information. As updated cost information is obtained, the model can be updated to reflect that new information.

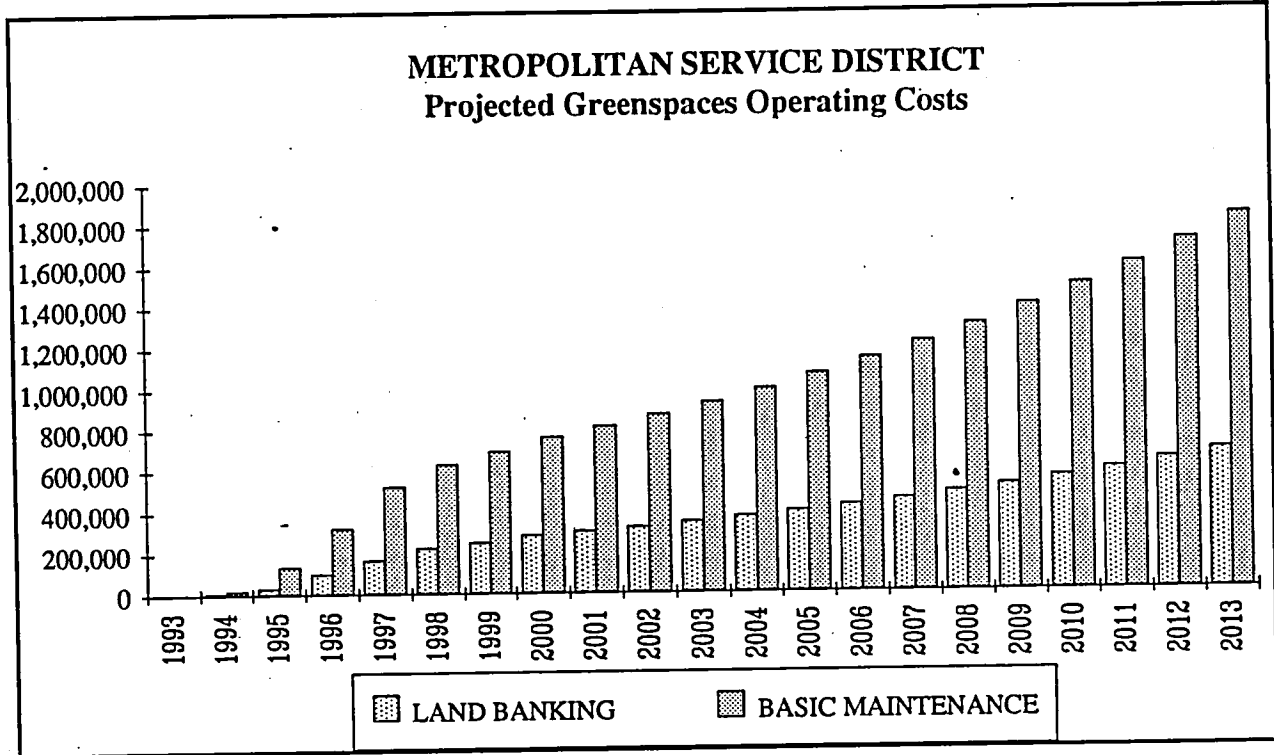
Metropolitan Service District  
Greenspaces Financial Study

	<u>Basic Maintenance Costs</u>	<u>Land Banking Costs</u>
Access Points	\$120 per acre, per year	\$35 per acre, per year
Addition	\$50 per acre, per year	\$35 per acre, per year
Reserve	\$50 per acre, per year	\$35 per acre, per year
Restoration	\$175 per acre, per year	\$35 per acre, per year
Trails	\$1,500 per linear mile, per year	\$35 per mile, per year

As previously, it is assumed that land acquisition will take place over several years. PFM has randomly assigned an acquisition schedule to the list of priority regionally significant sites identified in the Greenspaces Master Plan to simulate the acquisition of open space inventory that would be under Metro's ownership and responsibility. It is assumed for the purpose of this analysis that \$200 million in general obligation bonds are issued. By applying the per acre cost of maintenance shown above to the acquisition schedule, we have developed an estimate of annual costs for the program through FY 1999-2000.

These estimates of operating costs do not include amounts for on-going fire and safety protection. It is assumed for this analysis that this protection would be provided by local jurisdictions with augmentation by Metro, as necessary, for special circumstance situations.

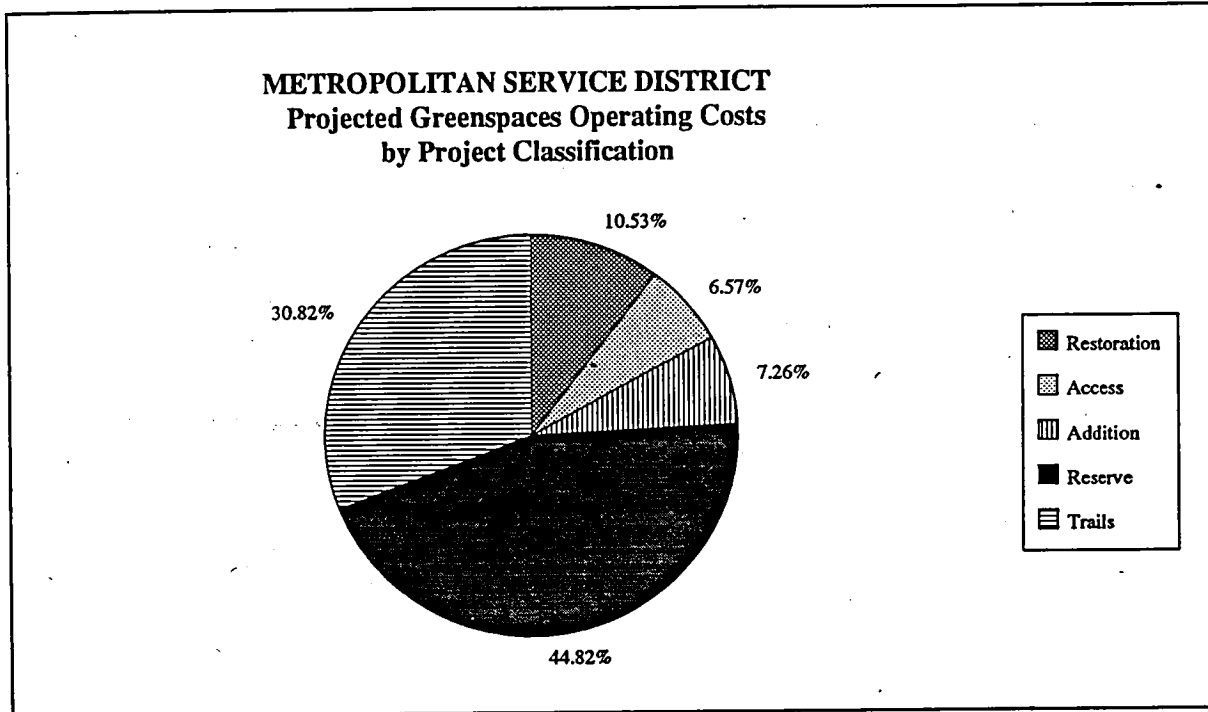
BASIC MAINTENANCE							Land Banking
	Restoration	Addition	Reserve	Access	Trails	Total	Total
FY 1993-94	19,000	0	0	0	0	19,000	4,000
FY 1994-95	35,000	7,000	21,000	1,000	71,000	135,000	29,000
FY 1995-96	48,000	32,000	90,000	1,000	151,000	322,000	99,000
FY 1996-97	52,000	39,000	160,000	32,000	241,000	524,000	165,000
FY 1997-98	55,000	42,000	236,000	39,000	258,000	630,000	223,000
FY 1998-99	59,000	45,000	269,000	41,000	276,000	690,000	250,000
FY 1999-2000	63,000	48,000	316,000	45,000	296,000	768,000	282,000



	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
LAND BANKING	4,000	29,000	99,000	165,000	223,000	250,000	282,000	301,000	322,000	345,000
BASIC MAINTENANCE	19,000	135,000	322,000	524,000	630,000	690,000	759,000	812,000	869,000	929,000

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
LAND BANKING	369,000	395,000	422,000	452,000	484,000	518,000	554,000	593,000	634,000	678,000
BASIC MAINTENANCE	994,000	1,064,000	1,139,000	1,218,000	1,304,000	1,395,000	1,492,000	1,597,000	1,709,000	1,828,000

The following graph presents the breakdown of basic maintenance operating costs by the categories identified above. As the graph shows, nearly one-half of the operating costs associated with the acquired land being considered for acquisition falls into the reserve category, and almost one-third are associated with trails.



### Revenue Sources for On-Going Operating and Capital Needs

As stated, the Greenspaces protection program requires care that continues beyond the acquisition stage. The funding of operational protection of the land must be a comprehensive approach that considers all available resources including internally-generated revenue, public funds, volunteer services and fund raising efforts. An examination of potential resources in each of these areas follows below.

It is critical to emphasize that the projections of operating costs are based on an assumption that the land acquired for greenspaces will not require high maintenance. In most cases, it is assumed that the land acquired will be essentially left as is, and consequently operating costs will be low. Therefore, the revenue sources identified to meet the ongoing needs will not have to be extensive revenue producers. Below is a list of possible revenue ideas under study, including several promising internally-generated sources.

#### *User Fees and Internally-Generated Revenue*

##### Greenspace Parking Permit

Since the magnitude of operating costs for the Program are likely to be relatively low, Metro can focus on revenue generating mechanisms that lack large scale revenue capacity. A revenue source that has been used by both the states of Oregon and Washington is a permit charge on vehicles that park within a designated open space area. In the Portland Metro region, the Department of Fish and Wildlife requires cars that park on Sauvie Island to obtain a permit, either for one day or for the year. This program was started in March 1990 and produces approximately \$120,000 annually. In 1992 the Department projects selling approximately 25,000 daily permits at \$2.50 and 6,000 annual permits for \$10.00. Compliance levels among visitors to the island ranges from approximately 40% on hot summer weekends to 85% during hunting and fishing season. Presumably, individuals that use the island frequently (hunters and fishermen) are more likely to be familiar with the parking permit program and have an annual permit. Compliance with the permit program is enforced by the state police, but collections from violators

go to the court system and not the Department.

Another example of a parking program is provided by the Oregon State Motor Vehicles Division Sno-Park program. The program requires that cars parking in the Oregon national forests and other recreational areas during parts of the year display a Sno-Park pass. The price of a daily pass is \$2.00 and an annual pass costs \$9.00. The program is susceptible to the skiing conditions on Mount Hood (the major site for revenue generation), but revenue production over the past nine years has ranged from \$577,012 in 1985-86 to \$751,393 in 1988-89. The number of annual passes sold in 1990-91 was 55,426 (\$498,834) and daily passes equaled 84,462 (\$168,924).

The Sno-Park program and the parking permit program on Sauvie Island provide examples of revenue generating mechanisms that could be employed by Metro in its Greenspaces Program. In both cases, these programs generate relatively modest revenues, but the magnitude of revenues expected to be needed to operate the Program are modest. Such a parking program also has the attraction that the most direct beneficiaries of the Program bear the costs of operations.

#### Day Use Fees and/or Camping Fees

The public could be charged for the use of the Program lands, either through annual memberships or on a daily basis. Fees could apply either to daytime use or for overnight camping. Initiation of this kind of program, however, would need to be considered in terms of the potential liability costs facing Metro. Charging for use of the Program lands would result in Metro assuming a greater duty to protect user from potential hazards on the lands than is the case if no charges are levied. This increase in potential liability might argue against any "fee for use" revenue scheme.

#### Concessions

Providing facilities for food, drink and gift concessions at Program sites could generate revenues, although it could cause two problems. One is related to the tax implications, as described above. Operators of concessions would either have to be public employees or work under a qualified management contract. Second, providing concessions at greenspace locations might run counter to the intent of the Program, which to provide the public with access to unspoiled natural areas. Concession facilities would likely generate garbage at the Program sites and diminish the natural qualities of the land.

#### *Public Funds*

The following is a brief discussion of potential public funds to finance operations and maintenance of the Program. It is important to again note that based on the projected operating costs, the level of collections would need to be very modest. Alternatively, the tax revenues could be levied at a rate that would allow application to more than one program. Other governments that operate open-space programs rely on a variety of tax revenue sources including property tax levies and real estate related taxes such as those outlined below.

#### Real Estate Taxes

When possible, equity and fairness considerations argue for a rational connection between the requirement for public funding and the industry or activity subject to taxation. The relationship between real estate growth and the need to preserve and protect open spaces is significant. The greater demand there is on the development of open land, the greater the need for government to step in and ensure adequate protection of open space to preserve the balance between economic development and quality of life for the region's residents. It is logical, therefore, to consider certain taxes on real estate transactions as a resource for Greenspace protection.



**REAL ESTATE TRANSFER TAX** - A Metro real estate transfer tax would place a charge on any real estate transactions taking place within Metro. Washington County is the only governmental unit in the State of Oregon that currently levies a real estate transfer tax. The tax in Washington County was imposed in 1974 and is levied at a rate of .1%, or \$1 per \$1,000 of the sale price of property. In fiscal year 1990 the tax produced \$1.56 million, indicating that a total of \$1.56 billion worth of real estate subject to the tax was transferred. The tax does not apply to transactions with a value of less than \$14,000. The Oregon State Legislature has prohibited the imposition of new real estate transfer taxes (or, in Washington County's case, increase in the existing tax) until January 1, 1994. Metro does not have the authority to levy this tax.

**BUILDING PERMIT CHARGE OR SQUARE FOOT ON NEW CONSTRUCTION CHARGE** - This tax source would involve a charge on the value of new construction levied at the time that the building permit was filed. The charge could either be based on the value of the permit or on the number of square feet of the building. The attraction to this kind of charge is its direct relationship to the growth pressures that are being exerted in the Metro region, and the consequent necessity for protecting existing greenspaces while they remain. Currently, Metro does not have the authority to levy this tax.

**LAND CORNER PRESERVATION FEE** - Current state law allows for counties to establish a fee which is to be used to pay the expenses incurred by the county surveyor in the establishment and maintenance of corners of government surveys. This fee is currently levied by each county on transfers of property, or the recording of various documents with the county clerk's office. Currently, Washington County charges \$8 as its fee, Clackamas County charges \$5 as its fee, and Multnomah County charges \$3 as its fee. The Program is necessary because of the explosive growth in the region. This fee is directly related to growth in the region, and is, therefore, a fair means of paying greenspaces operating and maintenance budget. Currently, Metro does not have the authority to levy this tax.

In order to enact this fee, legislative authority would have to be given in order to use the funds for the greenspaces program. Additionally, it would be most beneficial to the program if the total fee were \$15, \$10 of which should be given to the counties for current applications and the maintenance of their respective greenspaces, while \$5 could be given to Metro for its greenspaces. This fee would generate approximately \$1.8 million for the counties while generating about \$900,000 for Metro.

**OTHER REAL ESTATE TAXES** - Other real estate taxes might include a real property gains tax on sales of property above certain threshold levels, a so-called "mansion tax" on sale or building of residences above a certain threshold level, a mortgage tax on mortgage debt, anti-speculation taxes on property that is re-sold within a few years of its original purchase, and a title insurance surcharge.

#### Other Public Funds

**VEHICLE RENTAL CHARGE** - Multnomah County currently collects a 10% excise tax on vehicle rentals. In fiscal year 1991 that tax generated almost \$5 million in revenues for the County's general fund. In Metro's case, a vehicle rental charge tax would apply region-wide. In order to capture the main source of vehicle rental revenue, that originating from the Portland International Airport, a Metro tax would have to be applied on top of the current Multnomah County charge. Estimates of a region-wide 15% tax have ranged from \$11.1 million to \$17.1, including the portion currently collected by Multnomah County. Currently, Metro does not have the authority to levy this tax.

**GREEN FEES** - Certain jurisdiction use or have given consideration to using taxes and fees on certain activities, products or services related to encouraging sound environmental practices, dubbed "Green Fees." These include excise taxes on beer and wine, inclusion of wine and liquor bottles in current bottle deposit programs, container taxes, and tire sale fees among others.



### *Use of Volunteers and Other Donated or Free Services*

Virtually all open space programs throughout the United States make extensive use of volunteers and "Friends" groups to provide maintenance and programming services. Jurisdictions similar in size to Metro report the use of 200-225 volunteers per year to perform services ranging from general clean-up to education and docent activities. The City of Portland Parks and Recreation Department, open space division reports receiving 12,000 hours of donated labor per year.

In addition, most open space programs make use of correctional inmate programs (alternative community service workers) to perform clean up and maintenance services at very low cost. Additionally, it is possible to arrange for summer youth cleanup and maintenance crews funded through the Job Training and Partnership Act, a federally-funded summer jobs program. The City of Portland Parks and Recreation Program received 4,000 hours in services from this source last summer.

### Fund Raising Activities

Although it is inappropriate to rely exclusively on donations as a means to pay annual operating cost, possibilities exist to augment operating resources through fund raising activities, memberships to a greenspaces organization or friends groups affiliated with Metro, "adopt an acre" programs, auctions, and other fund raising activities. Proceeds of these earning could be used to build a greenspaces endowment for use in additional acquisition and capital improvements. An endowment would also be managed to return interest income each year that could be used for operation of Metro's open space areas. Since the projected operating and maintenance costs are relatively modest for the first several years of the Program, this time could be used to build up an endowment that could produce significant interest earnings by the time substantial operating costs are encountered.

### **Greenspaces Program Staffing**

Greenspaces activities are likely to require three staff groups: Planning; Acquisition, and Operations.

#### *Planning*

Metro currently supports 5.5 FTE to perform planning services for the Metropolitan Greenspaces program as follows: 1.0 FTE Regional Planning Supervisor, 2.0 FTE Senior Regional Planners, 1.0 FTE Associate Regional Planner, 1.0 FTE Program Assistant, and 0.5 FTE Secretary. To date, this staff have provided the majority of the staff support for this program, including an analysis of the area's open space land, Greenspace government coordination, Greenspaces education, community liaison, Greenspaces demonstration grants, and project management. It is assumed that most of this work would continue after a successful ballot measure and issuance of general obligation bonds.

The Planning staff would undertake the following activities on an ongoing basis: further definition of areas targeted for Greenspaces acquisition, large site management plan development, trail design, coordination of governmental cooperators and the community constituency, Greenspaces education, and the Greenspaces Master Plan updating. Currently this staff is supported by Metro excise tax and a grant from US Department of Fish and Wildlife. The grant funds are projected to be used by October 1994 and the availability of grant funds after that date is unknown. It is assumed for this analysis that excise tax would be used to support the activities of the grant-funded staff after grant funds are utilized and continue to be used to support the activities of other Greenspaces planning staff. A proposal to continue the Greenspaces Demonstration Grant program with bond proceeds is also under consideration. It is estimated that personal services, materials and services and capital outlay for the Planning staff group would be budgeted at approximately \$500,000 in FY 1993-94 the first full year of Greenspaces program operation.

#### *Acquisition*

Additional staff would be required to manage the open space acquisition and local government share programs. Recommendations are pending regarding staff that may be necessary to conduct research on available land,

negotiate with land owners, perform the various due diligence activities associated with purchasing land, including hazardous waste reports, engineering studies, and other required technical work. It is likely that there will be a role for outside professionals to provide purchased services for items such as real estate brokerage and property title services. In addition, internal central service staff will provide legal and financial support. It is assumed that the costs of acquisition management, including project management staff, required technical work on selected sites, and property closing costs will total 10% to 12% of the costs of acquired land.

The staff positions listed below represent the minimum staff necessary to provide project management for the acquisition program.

**Management Analyst Supervisor** : This staff person would manage division activities of open space acquisition and implementation of the local share program, as well as managing the contracts related to land acquisition. A background in project management would be a prerequisite for this individual.

**Senior Management Analyst** This position would involve examining proposed land acquisitions, work with real estate professionals and representatives from land trust organizations and assist in identifying and negotiating opportunities for trail right-of-ways and conservation easements. This position would be responsible for managing information related to property acquisition including closing documents, technical reports, and other required information. This position would be responsible for managing the local government share program, including negotiation of intergovernmental agreements.

**Associate Management Analyst** This position would work closely with real estate consultants to ensure that program objectives are being followed. A primary activity for the Associate Management Analyst would be to monitor local government share agreements.

**Secretary** This position would provide clerical support for the unit, maintain project files, and coordinate unit communications.

It is assumed that this staff would start with 4.0 FTE soon after the general obligation bonds are issued and expand by 1.0 FTE Associate Management Analyst in the second or third year of operation. On the basis of an assumed \$200 million bond issue, total costs for this staff, outside professional services, and other related costs would average approximately \$3 million annually over a five-year period. The cost for the acquisition staff and activity is definable as a project cost and, therefore, eligible and appropriate for financing out of general obligation bond proceeds.

#### *Operations*

Operation staff would be involved in the maintenance and operation of the open space areas acquired by Metro. As noted previously, it is assumed for the purposes of this analysis that land would be primarily held in its natural state with very little, if any, development. The budget for staff, materials and services, and capital outlays would conform, in total, with the annual costs projected for operations. As shown previously, these costs to range from \$135,000 in FY 1994-95 to \$524,000 in FY 1996-97. Future research must be done to determine the ultimate staffing configuration.

Financial support for operations activities is still under study. As discussed, a variety of alternatives including non-tax and tax resources are under consideration.

*Interpretive/Education Programs*

Full implementation of the Metropolitan Greenspaces Program would include management of interpretive and educational programs designed to enhance and encourage the public's use and enjoyment of the greenspaces system. Regional open space system managers have demonstrated that active participation and involvement of the public in open space areas will discourage inappropriate use of the areas.

Because this type of activity is discretionary in nature, no estimate of the associated funding requirements have been provided. The development of a funding plan for interpretive and educational programs, however, should ultimately be considered in the context of overall funding of Program operations. .

**Summary**

The preceding report and the computer model that accompanies it have been prepared to assist Metro in the formation of a funding and financing strategy for the Greenspaces Program. This report is intended to supplement information produced by the computer model as basic information about the Program size, timing, and composition evolves and is refined.

PFM believes that the initial stages of the Program will be an iterative process. Therefore, this report and the accompanying computer model will be modified as the needs of Metro evolve.

## FINANCE COMMITTEE REPORT

RESOLUTION NO. 92-1639A, SUBMITTING TO THE VOTERS QUESTIONS OF APPROVING A \$200 MILLION GENERAL OBLIGATION BOND AND AUTHORIZING THE DISTRICT TO ACQUIRE, DEVELOP, OPERATE AND MAINTAIN A REGIONAL SYSTEM OF GREENSPACES

Date: July 20, 1992

Presented By: Councilor Devlin

**COMMITTEE RECOMMENDATION:** At it's July 16, 1992 meeting the Committee voted unanimously to recommend Council approval of Resolution No. 92-1639 as amended. All Committee members were present and voting.

**COMMITTEE DISCUSSION/ISSUES:** Andy Cotugno, Planning Director, and Chris Scherer, Financial Planning Manager, presented the Staff Report. They presented summary information from the Greenspaces Financial Study (see Attachment 1 to this report) which indicates that approximately \$555 million is needed to implement the Greenspaces Master Plan and the Greenspaces Policy Advisory Committee is recommending a General Obligation Bond Measure of \$200 million dollars. The Greenspaces Bond Issue proceeds would be split 75% for the regional system and 25% allocated to local park providers for any park and recreation capital expenditure. In regard to operation and maintenance costs estimates were provided for a "basic maintenance" level and a "land banking" level. The Plan provides for the "land banking" level of maintenance to be provided with existing District resources and the "basic maintenance" to be provided following the acquisition of additional operating funds.

In response to questions from Council Staff, Mr. Cotugno stated that the uses of the funds for regional system purposes shown on page two of the Summary Financial Information (Attachment 1) are for illustration only. The Greenspaces Master Plan does not specify in that level of detail the policies for the use of the funds. A more detailed expenditure plan will be brought to the Council either in the form of annual budget requests or some other form for review and approval. He pointed out that the Ballot Title incorporated in this resolution does commit the District to pass on to local park providers up to 25% of the funds for local park capital expenditures.

A public hearing was held on Resolution No. 92-1639 and eleven persons appeared in support of the resolution. The name, address and affiliation of persons appearing before the Committee on this matter are included in Attachment 2 to this Report.

Mr. Cotugno presented amendments to Resolution No. 92-1639 which are included in the engrossed A-Draft. (See Attachment 3 to this Committee Report). The Committee accepted the proposed amendments with the understanding that General Counsel will review the proposed Ballot Title to assure that it enables the District to assume the regional park function as stated in ORS. Any changes are to be reviewed by Councilor Devlin prior to the Council meeting.

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ATTACHMENT 1  
(Fin. Comm. Rpt/Res 92-1639A)

# **Greenspaces Financial Study**

## **Summary Information**

### **Finance Committee Presentation**

**July 16, 1992**

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### Valuation of Greenspaces Inventory

<b>Sources</b>		
Bond proceeds		\$462,620,000
Interest earnings		92,098,000
<b>Total sources</b>		<b>\$554,718,000</b>
<b>Uses</b>		
Costs of bond issuance	1.25% of bonds	\$5,783,000
Remaining sources		548,935,000
Local government share	25.00%	137,234,000
Regional Share	75.00%	411,701,000
	% Regional Share	.
Transaction costs	12.00%	\$49,404,000
Large acre acquisition	60.00%	247,021,000
Large acre capital improvement	5.00%	20,585,000
Restoration acquisition	4.00%	16,468,000
Restoration capital improvement	3.00%	12,351,000
Trails acquisition	11.00%	45,287,000
Trails capital improvements	5.00%	20,585,000
<b>Total uses</b>		<b>\$554,718,000</b>

### Allocation of \$200,000,000 Greenspaces Bond Issue

<b>Sources</b>		
Bond proceeds		\$200,000,000
Interest earnings		37,000,000
<b>Total sources</b>		<b>\$237,000,000</b>
<b>Uses</b>		
Costs of bond issuance	1.25% of bonds	\$2,500,000
Remaining sources		\$234,500,000
Local government share	25.00%	58,625,000
Regional Share	75.00%	175,875,000
	% Regional Share	
Transaction costs	12.00%	21,105,000
Large acre acquisition	64.53%	113,492,000
Large acre capital improvement	3.00%	5,276,000
Restoration acquisition	4.47%	7,862,000
Restoration capital improvement	2.00%	3,518,000
Trails acquisition	11.00%	19,346,000
Trails capital improvements	5.00%	5,276,000
<b>Total uses</b>		<b>\$237,000,000</b>

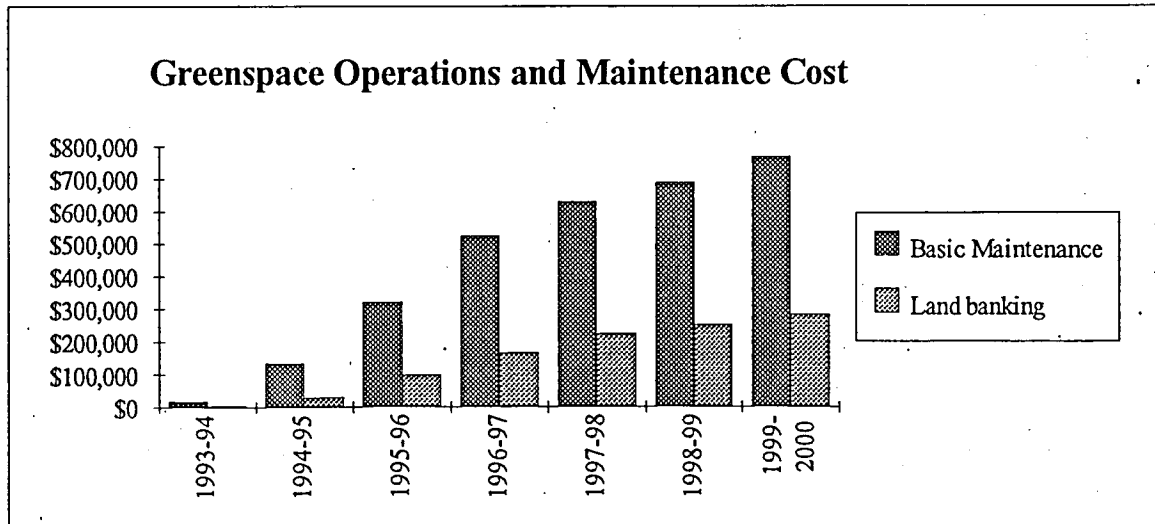
## Cost of Greenspaces Operations and Maintenance

### Estimated Unit Cost

	Basic Maintenance	Land banking
Access points	\$120 per acre, per year	\$35 per acre, per year
Reserve/Addition	\$50 per acre, per year	\$35 per acre, per year
Restoration	\$175 per acre, per year	\$35 per acre, per year
Trails	\$1,500 per linear mile, per year	\$35 per acre, per year

### Estimated Annual Cost

	Basic Maintenance	Land banking
FY 1993-94	\$19,000	\$4,000
FY 1994-95	135,000	29,000
FY 1995-96	322,000	99,000
FY 1996-97	524,000	165,000
FY 1997-98	630,000	223,000
FY 1998-99	690,000	250,000
FY 1999-2000	768,000	282,000



FINANCE COMMITTEE MEETING - July 16, 1992PUBLIC HEARING TESTIMONY  
GREENSPACES PROGRAMNAME/ADDRESSREPRESENTING

Bob Akers  
1038 S.E. 224th  
Gresham, OR

President, 40 Mile Loop (an organization supporting trail systems in Portland, the Metropolitan area and the state of Oregon); Past President, Friends of Powell Butte Nature Park; Past President, People for Parks Committee in Gresham; Member, Gresham City Council Park Advisory Board

Marty McCall  
5858 S.W. Riveridge Ln. #5  
Portland, OR 97201

Trust for Public Land (a 20 year old national land conservation organization)

Marguerite Nabeta  
525 Trade St. S.E.  
Salem, OR

Oregon State Parks and Recreation

Jean M. Ridings  
21510 N.E. Bluelake Rd.  
Troutdale, OR 97060

Member, Multnomah County Parks Advisory Committee  
Read letter into record from:  
Vivian Starbuck, Member, Multnomah County Parks Advisory Committee

Michael C. Houck  
5151 N.W. Cornell Rd.  
Portland, OR 97210

Audobon Society or Portland; Member, Metro Policy Advisory Committee; Member, Metro Technical Advisory Committee

John Sherman  
1912 N.W. Aspen  
Portland, OR 97210

President, Friends of Forest Park

Carol Pinegar  
2535 N.E. 13th  
Portland, OR 97212

Teacher, (Science - Middle School),  
Portland Public Schools

Clifton L. Powell  
11820 S.E. Foster Pl.  
Portland, OR 97266

Member, Friends of Johnson Creek;  
Member, Johnson Creek Corridor Committee



Finance Committee Meeting  
July 16, 1992  
Public Testimony  
Page 2

Linda Robinson  
1115 N.E. 135th Ave.  
Portland, OR 97230

Paul Gleason  
7638 S.W. 36th  
Portland, OR 97219-1631

Jim Sjulín  
1120 S.W. 5th #1302  
Portland, OR 97204

Director, F.A.U.N.A. (Friends and  
Advocates of Urban Natural Areas)

Secretary-Treasurer, Pacific  
Wonderland, (an environmental  
education corporation); Nurse,  
Outdoor School

Supervisor, Natural Resources  
Program, Bureau of Parks and  
Recreation, City of Portland

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**METRO**

Planning Department  
2000 S.W. First Avenue  
Portland, OR 97201-5398  
(503) 221-1646

**Memorandum**

ATTACHMENT 3

(Fin. Comm. Rpt/Res 92-1639A)

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DATE: July 16, 1992  
TO: Council Finance Committee  
FROM: *AC* Andy Cotugno  
SUB: Resolution No. 92-1639A

Based on discussions with the Office of General Counsel and Metro Bond Counsel, revisions to Resolution No. 92-1639 are recommended. Resolution 92-1639A is attached incorporating the following changes:

1. Adding an action no. 5 on the last page prior to the Presiding Officer's signature block requesting that the Executive Officer submit the necessary materials for including the ballot measure in the State Voters' Pamphlet; and
2. Substituting the Recommended Bond Measure for the Sample Bond Measure attached as Exhibit A to Resolution No. 92-1639. Changes in wording between the "Recommended" and "Sample" Bond measures are indicated by overstriking (deletions) and shading (additions).

**EXECUTIVE OFFICERS RECOMMENDATION**

The Executive Officer Recommends adoption of Resolution No. 92-1639A

Amended as 7/23/92

Council —

see New Exhibit A

EXHIBIT A

Recommended Bond Measure

Caption: "Bonds to Save Green Spaces and Fund Parks System"

Question: "Shall Metro sell two hundred million dollars of general obligation bonds for green-ways, parks, open space and recreation facilities. If the bonds are approved, they will be payable from taxes on property or property ownership that are not subject to the limits of section 11b, Article XI of the Oregon Constitution."

Explanation Summary Statement: "Bond will permit Metro to acquire, save, and improve green spaces, parks, and recreation assets. Bonds will mature in thirty years. At least Seventy-Five percent of bond funds will go to buy, and restore nature parks, trails, and green-ways. Up to twenty-five percent of bond funds may be used to help parks departments to buy and improve local parks. Bond funds will not be used for parks maintenance costs. Estimate of mean yearly cost of bonds is 19 1/2 cents per one thousand dollars of assessed value."

BEFORE THE COUNCIL OF THE  
METROPOLITAN SERVICE DISTRICT

FOR THE PURPOSE OF SUBMITTING	)	RESOLUTION NO. 92-1639
TO THE VOTERS QUESTIONS OF	)	
CONTRACTING A GENERAL OBLIGATION	)	Introduced By Executive
BOND INDEBTEDNESS IN THE AMOUNT	)	Officer Rena Cusma and
OF \$200 MILLION AND AUTHORIZATION	)	Councilor Richard Devlin
TO PROCEED WITH THE FINANCING,	)	
ACQUISITION, DEVELOPMENT,	)	
OPERATIONS, AND MAINTENANCE OF A	)	
REGIONAL SYSTEM OF GREENSPACES	)	

WHEREAS, The Metropolitan Service District has taken a leadership role in identifying remaining natural areas in the region and planning for their protection or potential acquisition; and

WHEREAS, Such activities have been and will continue to be coordinated with the affected federal, state, and local governments and citizens in the region; and

WHEREAS, Numerous planning efforts, studies and recommendations have been proposed over the past 90 years to develop a system of interconnected greenspaces for the Portland/Vancouver region; and

WHEREAS, On June 28, 1990, by Resolution No. 90-1261, the Metro Council established a Policy Advisory Committee to assist the Council in coordinating its Natural Areas Planning Program and to develop a regional consensus in the development of a Metropolitan Greenspaces Master Plan; and

WHEREAS, On December 13, 1990, by Resolution No. 90-1344, Metro established a Technical Advisory Committee to assist the Metro Council in coordinating the Metropolitan Greenspaces Program

and Master Plan; and

WHEREAS, On April 29, 1992 a Metropolitan Greenspaces Master Plan Public Review Draft was released for comment through June 15, 1992; and

WHEREAS, On May 28 1992, by Resolution No. 92-1616 the Metro Council stated its intent to adopt a Metropolitan Greenspaces Master Plan; and

WHEREAS, Between April 29 and June 15, 1992 Metro staff have undertaken an extensive public involvement effort to solicit comments on the Master Plan Public Review Draft including:

1. Briefings of the governing bodies of most cities and counties and special parks districts within the Metropolitan Service District Boundary;
2. A series of five public workshops throughout the region;
3. Numerous meetings of the Metropolitan Greenspaces Policy and Technical Advisory Committees;
4. Several meetings with the Greenspaces subcommittee of the Metro City Managers organization;
5. Briefings for the State Agency Council for Growth Issues in the Portland Metropolitan Area, Metro's Regional Policy Advisory Committee, and the Metro City Planning Directors organization;
6. Numerous briefings for civic groups, neighborhood organizations educational and special interest groups.; and

WHEREAS, Significant improvements to the Metropolitan

Greenspaces Master Plan have resulted from this review process; and

WHEREAS, The Metro Council adopted the Metropolitan Greenspaces Master Plan by Resolution No. 92-1637; and

WHEREAS, The Metropolitan Greenspaces Master Plan recommends that Metro seek a regional funding mechanism to assemble, through acquisition and other strategies, and develop a regional greenspaces system and also assume operations and management responsibility for components of the system in cooperation with local governments; and

WHEREAS, On July 2, 1992 the Portland Metropolitan Area Local Government Boundary Commission approved Proposal AF-4 allowing Metro to seek voter approval to acquire, develop, maintain, and operate a system of parks, open space and recreational facilities of metropolitan significance, now, therefore,

BE IT RESOLVED,

1. That the Council of the Metropolitan Service District hereby submits to the qualified voters of the District the question of contracting a General Obligation bond indebtedness of \$200 million. The bonds shall mature over a period of not more than 30 years.

2. That the voters of the District shall in the same measure consider the question of whether Metro may finance the acquisition, development, maintenance and operation of a system of parks, open space, and recreational facilities of metropolitan significance pursuant to ORS 268.312 (1)(c).

3. That the measure shall be placed on the ballot for

the General election held on the 3rd day of November, 1992.

4. That the District shall cause this Resolution and the Ballot Title Attached as Exhibit "A" to be submitted to the Elections Officer, the Tax Supervising and Conservation Commission, and the Secretary of State in a timely manner as required by law.

ADOPTED by the Council of the Metropolitan Service District this \_\_\_\_\_ day of \_\_\_\_\_, 1992.

---

Jim Gardner, Presiding Officer

## EXHIBIT A

### Sample Bond Measure

Caption: "Acquire Land to Develop Regional Natural Areas/Park System"

Question: "Shall District acquire, develop, maintain, operate regional system of parks, open spaces, recreational facilities, issue \$200 million General Obligation bonds? If the bonds are approved, they will be payable from taxes on property or property ownership that are not subject to the limits of section 11b, Article XI of the Oregon Constitution."

Summary Statement: "Metro seeks voter approval for \$200 million in general obligation bonds to buy land, improve, pay related costs for a regional system of natural areas, parks, trails and greenways for wildlife and people. After costs to sell bonds, local governments shall spend up to 25 percent of net proceeds for local park, recreation system needs. Metro shall spend at least 75 percent of proceeds to buy and develop large acre sites, land to restore, and trails. These funds shall not operate or maintain these lands."



BEFORE THE COUNCIL OF THE  
METROPOLITAN SERVICE DISTRICT

FOR THE PURPOSE OF SUBMITTING TO )  
THE VOTERS QUESTIONS OF CONTRACTING )  
A GENERAL OBLIGATION BOND INDEBTED- )  
NESS IN THE AMOUNT OF \$200 MILLION )  
AND AUTHORIZATION TO PROCEED WITH )  
THE FINANCING, ACQUISITION, )  
DEVELOPMENT, OPERATIONS AND )  
MAINTENANCE OF A REGIONAL SYSTEM )  
OF GREENSPACES )

RESOLUTION NO. 92-1639A

Introduced by Executive  
Officer Rena Cusma and  
Councilor Richard Devlin

WHEREAS, The Metropolitan Service District has taken a leadership role in identifying remaining natural areas in the region and planning for their protection or potential acquisition; and

WHEREAS, Such activities have been and will continue to be coordinated with the affected federal, state, and local governments and citizens in the region; and

WHEREAS, Numerous planning efforts, studies and recommendations have been proposed over the past 90 years to develop a system of interconnected greenspaces for the Portland/Vancouver region; and

WHEREAS, On June 28, 1990, by Resolution No. 90-1261, the Metro Council established a Policy Advisory Committee to assist the Council in coordinating its Natural Areas Planning Program and to develop a regional consensus in the development of a Metropolitan Greenspaces Master Plan; and

WHEREAS, On December 13, 1990, by Resolution No. 90-1344, Metro established a Technical Advisory Committee to assist the Metro Council in coordinating the Metropolitan Greenspaces Program and Master Plan; and

WHEREAS, On April 29, 1992 a Metropolitan Greenspaces Master Plan Public Review Draft was released for comment through June 15, 1992; and

WHEREAS, On May 28 1992, by Resolution No. 92-1616 the Metro Council stated its intent to adopt a Metropolitan Greenspaces Master Plan; and

WHEREAS, Between April 29 and June 15, 1992 Metro staff have undertaken an extensive public involvement effort to solicit comments on the Master Plan Public Review Draft including:

1. Briefings of the governing bodies of most cities and counties and special parks districts within the Metropolitan Service District Boundary;
2. A series of five public workshops throughout the region;
3. Numerous meetings of the Metropolitan Greenspaces Policy and Technical Advisory Committees;
4. Several meetings with the Greenspaces subcommittee of the Metro City Managers organization;
5. Briefings for the State Agency Council for Growth Issues in the Portland Metropolitan Area, Metro's Regional Policy Advisory Committee, and the Metro City Planning Directors organization;
6. Numerous briefings for civic groups, neighborhood organizations educational and special interest groups; and

WHEREAS, Significant improvements to the Metropolitan Greenspaces Master Plan have resulted from this review process; and

WHEREAS, The Metro Council adopted the Metropolitan Greenspaces Master Plan by Resolution No. 92-1637; and

WHEREAS, The Metropolitan Greenspaces Master Plan recommends that Metro seek a regional funding mechanism to assemble, through acquisition and other strategies, and develop a regional greenspaces system and also assume operations and management responsibility for components of the system in cooperation with local governments; and

WHEREAS, On July 2, 1992 the Portland Metropolitan Area Local Government Boundary Commission approved Proposal AF-4 allowing Metro to seek voter approval to acquire, develop, maintain, and operate a system of parks, open space and recreational facilities of metropolitan significance, now, therefore,

BE IT RESOLVED,

1. That the Council of the Metropolitan Service District hereby submits to the qualified voters of the District the question of contracting a General Obligation bond indebtedness of \$200 million. The bonds shall mature over a period of not more than 30 years.

2. That the voters of the District shall in the same measure consider the question of whether Metro may finance the acquisition, development, maintenance and operation of a system

of parks, open space, and recreational facilities of metropolitan significance pursuant to ORS 268.312 (1)(c).

3. That the measure shall be placed on the ballot for the General election held on the 3rd day of November 1992.

4. That the District shall cause this Resolution and the Ballot Title Attached as Exhibit "A" to be submitted to the Elections Officer, the Tax Supervising and Conservation Commission, and the Secretary of State in a timely manner as required by law.

5. That the Executive Officer, pursuant to ORS 251.285 and Metro Code Chapter 2.10, shall transmit this measure, ballot title, an explanatory statement and arguments for or against, if any, to the Secretary of State for inclusion in the State Voters' Pamphlet.

ADOPTED by the Council of the Metropolitan Service

District this \_\_\_\_\_ day of \_\_\_\_\_ 1992.

\_\_\_\_\_  
Jim Gardner, Presiding Officer

PL/srs  
res&ord\r921639  
07/16/92

EXHIBIT A

Recommended Sample Bond Measure

Caption: "Bonds to Save Green Spaces and Fund Parks System.  
~~Acquire Land to Develop Regional Natural Areas/Parks System"~~

Question: "Shall Metro sell two hundred million dollars of general obligation bonds for green-ways, parks, open space and recreation facilities. ~~Shall district acquire, develop, maintain, operate regional system of parks, open spaces, recreational facilities, issue \$200 million General Obligation bonds?~~ If the bonds are approved, they will be payable from taxes on property or property ownership that are not subject to the limits of section 11b, Article XI of the Oregon Constitution."

Explanation Summary Statement: "Bond will permit Metro to acquire, save, and improve green spaces, parks, and recreation assets. Bonds will mature in thirty years. At least Seventy-Five percent of bond funds will go to buy, and restore nature parks, trails, and green-ways. Up to twenty-five percent of bond funds may be used to help parks departments to buy and improve local parks. Bond funds will not be used for parks maintenance costs. Estimate of mean yearly cost of bonds is 19 1/2 cents per one thousand dollars of assessed value. ~~Metro seeks voter approval for \$200 million in general obligation bonds to buy land, improve, pay related costs for a regional system of natural areas, parks, trails and greenways for wildlife and people. After costs to sell bonds, local governments shall spend up to 25 percent of net proceeds for local park, recreation system needs. Metro shall spend at least 75 percent of proceeds to buy and develop large acre sites, land to restore and trails. These funds shall not operate or maintain these lands.~~"

PL/srs  
s:\pd\grnspc\r921639  
07/16/92

BEFORE THE COUNCIL OF THE  
METROPOLITAN SERVICE DISTRICT

FOR THE PURPOSE OF SUBMITTING )  
TO THE VOTERS QUESTIONS OF )  
CONTRACTING A GENERAL )  
OBLIGATION BOND INDEBTEDNESS IN )  
THE AMOUNT OF \$200 MILLION AND )  
AUTHORIZATION TO PROCEED WITH )  
THE FINANCING, ACQUISITION, )  
DEVELOPMENT, OPERATIONS AND )  
MAINTENANCE OF A REGIONAL )  
SYSTEM OF GREENSPACES )

RESOLUTION NO. 92-1639A

Introduced by Rena Cusma,  
Executive Officer and  
Councilor Richard Devlin

WHEREAS, The Metropolitan Service District has taken a leadership role in identifying remaining natural areas in the region and planning for their protection or potential acquisition; and

WHEREAS, Such activities have been and will continue to be coordinated with the affected federal, state, and local governments and citizens in the region; and

WHEREAS, Numerous planning efforts, studies and recommendations have been proposed over the past 90 years to develop a system of interconnected greenspaces for the Portland/Vancouver region; and

WHEREAS, On June 28, 1990, by Resolution No. 90-1261, the Metro Council established a Policy Advisory Committee to assist the Council in coordinating its Natural Areas Planning Program and to develop a regional consensus in the development of a Metropolitan Greenspaces Master Plan; and

WHEREAS, On December 13, 1990, by Resolution No. 90-1344, Metro established a Technical Advisory Committee to assist the

Metro Council in coordinating the Metropolitan Greenspaces Program and Master Plan; and

WHEREAS, On April 29, 1992 a Metropolitan Greenspaces Master Plan Public Review Draft was released for comment through June 15, 1992; and

WHEREAS, On May 28 1992, by Resolution No. 92-1616 the Metro Council stated its intent to adopt a Metropolitan Greenspaces Master Plan; and

WHEREAS, Between April 29 and June 15, 1992 Metro staff have undertaken an extensive public involvement effort to solicit comments on the Master Plan Public Review Draft including:

1. Briefings of the governing bodies of most cities and counties and special parks districts within the Metropolitan Service District Boundary;
2. A series of five public workshops throughout the region;
3. Numerous meetings of the Metropolitan Greenspaces Policy and Technical Advisory Committees;
4. Several meetings with the Greenspaces subcommittee of the Metro City Managers organization;
5. Briefings for the State Agency Council for Growth Issues in the Portland Metropolitan Area, Metro's Regional Policy Advisory Committee, and the Metro City Planning Directors organization;
6. Numerous briefings for civic groups, neighborhood organizations educational and special interest groups.; and

WHEREAS, Significant improvements to the Metropolitan Greenspaces Master Plan have resulted from this review process; and

WHEREAS, The Metro Council adopted the Metropolitan Greenspaces Master Plan by Resolution No. 92-1637; and

WHEREAS, The Metropolitan Greenspaces Master Plan recommends that Metro seek a regional funding mechanism to assemble, through acquisition and other strategies, and develop a regional greenspaces system and also assume operations and management responsibility for components of the system in cooperation with local governments; and

WHEREAS, On July 2, 1992 the Portland Metropolitan Area Local Government Boundary Commission approved Proposal AF-4 allowing Metro to seek voter approval to acquire, develop, maintain, and operate a system of parks, open space and recreational facilities of metropolitan significance, now, therefore,

BE IT RESOLVED,

1. That the Council of the Metropolitan Service District hereby submits to the qualified voters of the District the question of contracting a General Obligation bond indebtedness of \$200 million. The bonds shall mature over a period of not more than 30 years.

2. That the voters of the District shall in the same measure consider the question of whether Metro may finance the acquisition, development, maintenance and operation of a system of parks, open space, and recreational facilities of metropolitan significance pursuant to ORS 268.312 (1)(c).



3. That the measure shall be placed on the ballot for the General election held on the 3rd day of November, 1992.

4. That the District shall cause this Resolution and the Ballot Title Attached as Exhibit "A" to be submitted to the Elections Officer, the Tax Supervising and Conservation Commission, and the Secretary of State in a timely manner as required by law.

5. That the Executive Officer, pursuant to ORS 251.285 and Metro Code Chapter 2.10, shall transmit this measure, ballot title, an explanatory statement and arguments for or against, if any, to the Secretary of State for inclusion in the State Voters' Pamphlet.

ADOPTED by the Council of the Metropolitan Service District this \_\_\_\_\_ day of \_\_\_\_\_, 1992.

\_\_\_\_\_  
Jim Gardner, Presiding Officer

Attest:

\_\_\_\_\_  
Clerk of the Council

EXHIBIT A

Recommended Sample Bond Measure

Caption: "Bonds to Save Green Spaces and Fund Parks System Acquire Land to Develop Regional Natural Areas/Parks System"

Question: "Shall Metro sell two hundred million dollars of general obligation bonds for green-ways, parks, open space and recreation facilities. Shall district acquire, develop, maintain, operate regional system of parks, open spaces, recreational facilities, issue \$200 million General Obligation bonds? If the bonds are approved, they will be payable from taxes on property or property ownership that are not subject to the limits of section 11b, Article XI of the Oregon Constitution."


Explanation-Summary Statement: "Bond will permit Metro to acquire, save, and improve green spaces, parks, and recreation assets. Bonds will mature in thirty years. At least Seventy-Five percent of bond funds will go to buy, and restore nature parks, trails, and green-ways. Up to twenty-five percent of bond funds may be used to help parks departments to buy and improve local parks. Bond funds will not be used for parks maintenance costs. Estimate of mean yearly cost of bonds is 19 1/2 cents per one thousand dollars of assessed value. Metro seeks voter approval for \$200 million in general obligation bonds to buy land, improve, pay related costs for a regional system of natural areas, parks, trails and greenways for wildlife and people. After costs to sell bonds, local governments shall spend up to 25 percent of net proceeds for local park, recreation system needs. Metro shall spend at least 75 percent of proceeds to buy and develop large acre sites, land to restore and trails. These funds shall not operate or maintain these lands."

---

**METRO****Memorandum**

Planning Department  
2000 S.W. First Avenue  
Portland, OR 97201-5398  
(503) 221-1646

---

**DATE:** July 16, 1992  
**TO:** Council Finance Committee  
**FROM:**  Andy Cotugno  
**SUB:** Resolution No. 92-1639A

Based on discussions with the Office of General Counsel and Metro Bond Counsel, revisions to Resolution No. 92-1639 are recommended. Resolution 92-1639A is attached incorporating the following changes:

1. Adding an action no. 5 on the last page prior to the Presiding Officer's signature block requesting that the Executive Officer submit the necessary materials for including the ballot measure in the State Voters' Pamphlet; and
2. Substituting the Recommended Bond Measure for the Sample Bond Measure attached as Exhibit A to Resolution No. 92-1639. Changes in wording between the "Recommended" and "Sample" Bond measures are indicated by overstriking (deletions) and shading (additions).

**EXECUTIVE OFFICERS RECOMMENDATION**

The Executive Officer Recommends adoption of Resolution No. 92-1639A



# METRO

2000 SW First Avenue  
Portland, OR 97201-5398  
(503) 221-1646  
Fax 241-7417

**RECEIVED**

**JUL 24 1992**

**METRO SERVICE DISTRICT**  
EXFC

July 23, 1992

**Executive Officer**  
Rena Cusma

**Metro Council**

Jim Gardner  
*Presiding Officer*  
District 3

Judy Wyers  
*Deputy Presiding Officer*  
District 8

Susan McLain  
District 1

Lawrence Bauer  
District 2

Richard Devlin  
District 4

Edward P. Gronke  
District 5

George Van Bergen  
District 6

Ruth McFarland  
District 7

Tanya Collier  
District 9

Roger Buchanan  
District 10

Ed Washington  
District 11

Sandi Hansen  
District 12

**The Honorable Rena Cusma**  
**Executive Officer**  
**Metropolitan Service District**  
**2000 S.W. First Avenue**  
**Portland, OR 97201-5398**


**The Honorable Jim Gardner**  
**Presiding Officer**  
**Metropolitan Service District**  
**2000 S.W. First Avenue**  
**Portland, OR 97201-5398**

**Dear Executive Officer and Presiding Officer:**

**Re: Explanatory Statement for Measure Referred to Voters**  
**Pursuant to Resolution No. 92-1639A (Green Spaces Bonds)**

**Enclosed for filing pursuant to Metro Code Section 2.10.050 is an Explanatory Statement for publication in the state Voters' Pamphlet for the above-referenced measure.**

**Yours very truly,**

  
**Daniel B. Cooper**  
**General Counsel**

gl  
1595

**Enclosure**

## State Voters' Pamphlet Statement

If approved by the voters, this \$200 million general obligation bond measure will allow Metro, together with local parks providers, to begin implementing the Metropolitan Greenspaces Master Plan. This Plan provides for acquiring, developing, maintaining and operating a system of natural areas, trails and greenways to be shared by people and wildlife, now and in the future.

The Greenspaces Plan was developed in a cooperative effort. Numerous citizens' groups, business and community leaders, and representatives of the 24 cities, three counties, and two special parks districts in metropolitan Clackamas, Multnomah and Washington counties spent over three years putting together the Plan.

Only about 8 percent of our important urban natural resources are currently protected as greenspaces, leaving nearly 92 percent available for some sort of development. The bond measure is important to protect natural areas in a greenspaces system, preserving wildlife habitat and open spaces for animals, plants and people.

The Greenspaces Plan identifies 57 areas, distributed throughout the tri-county region, where important ecological resources and open spaces should be protected. The measure should make it possible to acquire over 7,000 acres of privately-owned land for natural areas and trail rights-of-way. This would increase protected greenspaces' by over 75 percent. Included among the areas are the following:

- o Forty-Mile Loop Trail
- o Willamette Greenway
- o Forest Park
- o Columbia River shoreline habitats
- o Volcanic Buttes in the Gresham/Boring/Sunnyside vicinity
- o Sandy and Clackamas River scenic areas
- o Jackson Bottom and Tualatin River access points
- o other areas nominated by citizens and local governments, including greenspaces restoration projects in heavily urbanized communities.

The Greenspaces Plan should be consulted for a complete listing of these important areas. The specific land parcels to be assembled for the system would be determined by opportunities and factors in each location.

The general obligation bond is estimated to increase the property tax rate by a maximum of 32.5 cents per \$1,000 of property value in the first year. For a \$100,000 home, this is an increase of \$32.50. However, the rate will decline steadily as total assessed value increases. The tax rate is estimated to drop to a low of 10.41 cents per \$1,000 the last year. The average annual rate over the 30-year life of the bond issue is estimated to be 19.45 cents per \$1,000 of assessed value.

Up to 25 percent of the bond proceeds will be distributed to local governments that are providing park services. These funds will be available for locally-determined land acquisition and capital improvements for park and recreation facilities. At least 75 percent of the bond proceeds will be used by Metro to protect and improve resources identified in the Master Plan. No portion of the bond funds will be used for operations and maintenance.

Voter approval of this measure provides the funds and the legal authority for Metro to acquire and protect areas identified in the Greenspaces Plan.



# METRO

2000 SW First Avenue  
Portland, OR 97201-5398  
(503) 221-1646  
Fax 241-7417

HAND DELIVERED

July 24, 1992

Ms. Vicki K. Ervin  
Elections Director  
Multnomah County Elections  
1040 S.E. Morrison Street  
Portland, OR 97214

Executive Officer  
Rena Cusma

Metro Council

Jim Gardner  
Presiding Officer  
District 3

Judy Wyers  
Deputy Presiding  
Officer  
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District 6

Ruth McFarland  
District 7

Tanya Collier  
District 9

Roger Buchanan  
District 10

Ed Washington  
District 11

Sandi Hansen  
District 12

Dear Ms. Ervin:

Re: Metro Greenspaces Ballot Measure Explanatory Statement  
(Resolution No. 92-1639A)

Enclosed please find an explanatory statement for the state Voters' Pamphlet that has been prepared by Metro's General Counsel pursuant to ORS 251.285 and Metro Code Chapter 2.10. A copy of the Code section is attached (see 2.10.050(b)).

Please cause a notice of the filing of this statement to be published on a joint basis with the required notice of filing of the ballot title. Please send the bill to this Office.

Please provide this Office with a copy of the certificate of publication.

Yours very truly,

Richard Engstrom,  
Deputy Executive Officer

dr  
1465

Enclosures

CHAPTER 2.10

VOTERS' PAMPHLET

SECTIONS:

- 2.10.010 State Voter's Pamphlet
- 2.10.020 Definitions
- 2.10.030 District Measures Included in the Pamphlet
- 2.10.040 Preparation and Judicial Review of Ballot Titles
- 2.10.050 Preparation and Judicial Review of Explanatory Statements
- 2.10.060 Arguments Support and Opposing Measures
- 2.10.070 Filing of Material with the Secretary of State

2.10.010 State Voters' Pamphlet: The Metropolitan Service District believes it to be in the interest of the electors of the District that ballot titles, explanatory statements and arguments relating to District measures be included in the state Voters' Pamphlet, as authorized by ORS 254.285 and provided for in Sections 2.10.010 through 2.10.070 of this Chapter.

(Ordinance No. 90-330A)

2.10.020 Definitions: As used in this Chapter:

(a) "Committee Director" has the meaning given that term in ORS 260.005.

(b) "Court" means the Circuit Court of the State of Oregon for the County of Multnomah.

(c) "Filing Officer" means the director of the Multnomah County Division of Elections.

(d) "Measure" has the meaning given that term in ORS 251.005.

(e) "Political Committee" has the meaning given that term in ORS 260.005.

(f) "Voters' Pamphlet" means the state Voters' Pamphlet published pursuant to ORS Chapter 251.

(Ordinance No. 90-330A)

2.10.030 District Measures Included in the Pamphlet: A District measure shall qualify for inclusion in the Voters' Pamphlet under the provisions of ORS 251.285 and Sections 2.10.010 through 2.10.070 of this Chapter if:

(a) The measure is submitted to the electors at an election for which a Voters' Pamphlet is printed;

(b) All procedures set forth in Sections 2.10.010 through 2.10.070 of this Chapter relating to the preparation of the ballot title and explanatory statement for the measure, including review by the Court, have been completed on or before the 75th day prior to the date of the election at which the measure is to be submitted to the electors; and

(c) In the case of a measure proposed by initiative or referendum petition:

- (1) The Filing Officer certifies that the petition has sufficient qualified signatures to require submission of the measure to the electors; and
- (2) Such certification is filed with the Executive Officer on or before the 90th day preceding the election at which the measure is to be submitted to the electors.

(Ordinance No. 90-330A)

#### 2.10.040 Preparation and Judicial Review of Ballot Titles:

(a) A ballot title for a measure proposed by initiative or referendum petition shall be prepared as provided in ORS 255.145. A ballot title for a measure referred to the electors by the District shall be prepared by the District.

(b) Judicial review of any ballot title for a District measure shall be as provided in ORS 255.155.

(Ordinance No. 90-330A)

#### 2.10.050 Preparation and Judicial Review of Explanatory Statements:

(a) Explanatory statements for all District measures shall be prepared by General Counsel and shall be filed with the Executive Officer. An explanatory statement shall be an impartial, simple and understandable statement of 500 words or less, explaining the measure and its effect. The explanatory statement for a measure referred by the District shall be filed with the Executive Officer and the Council at the same time as the ordinances or resolutions referring the measure is acted upon by the Council. The explanatory statement for a measure proposed by initiative or referendum petition shall be filed with the Executive Officer not later than the seventh business day after the petition is submitted to the Filing Officer for signature verification.



(b) Upon receipt of an explanatory statement, the Executive Officer shall publish in the next available edition of a newspaper of general circulation in the District a notice of receipt of the statement including notice that an elector may file a petition for review of the statement not later than the date referred to in subsection (c) of this section. The Executive Officer and the Filing Officer may jointly publish notice of the explanatory statement and ballot title for a measure in the same publication.

(c) Any elector dissatisfied with an explanatory statement for a District measure may petition the Court stating the reasons why the statement does not meet the requirements of subsection (a) of this section. The petition shall be filed not later than the seventh business day after the statement is filed with the Executive Officer. An elector filing a petition with the Court shall also file a copy of the petition with the Executive Officer not later than the end of the next business day following the date the petition is filed with the Court. The Court shall review the statement and measure, hear arguments, if any, and certify to the Executive Officer a statement for the measure which meets the requirement of subsection (a) of this section. Review by the Court shall be first and final.

(Ordinance No. 90-330A)

2.10.060 Arguments Supporting and Opposing Measures:

(a) Arguments in support of or opposition to a measure which is subject to this Chapter may be filed with the Executive Officer not later than the 75th day prior to the date of the election at which the measure is to be submitted to the electors by:

- (1) Any person who tenders a filing fee in the amount of \$300 and submits a statement on such form as the Executive Officer may prescribe or provide, which:
  - (A) Identifies the name of the person who submitted the argument;
  - (B) Identifies the name of the organization the person represents, if any;
  - (C) Indicates whether the argument supports or opposes the measure; and
  - (D) Indicates who authorized publication of the argument.

(2) A person who files a petition for the inclusion of the argument in the Voters' Pamphlet which contains the signatures of not less than 1,000 electors of the District. Before the argument is filed with the Executive Officer, the signatures on the petition shall be verified by the Filing Officer. Prior to the circulation of a petition under this paragraph, a prospective petition shall be filed with the Executive Officer, on such form as the Executive Officer may prescribe or provide, which:

- (A) Sets forth the text of the proposed argument;
- (B) Identifies the name of the person who submitted the argument;
- (C) Indicates the name of the organization the person represents, if any;
- (D) Indicates whether the argument supports or opposes the measure; and
- (E) Indicates who authorized publication of the argument.

(b) Arguments shall be typewritten and shall be prepared for printing on 29.7 square inches of the Voters' Pamphlet.

(Ordinance No. 90-330A)

2.10.070 Filing of Material with the Secretary of State: The Executive Officer shall file all measures, ballot titles, explanatory statements and arguments that meet the requirements of this Chapter with the Secretary of State and the Clerk of the Council not later than the 70th day prior to the date of the election for which a Voters' Pamphlet will be printed.

(Ordinance No. 90-330A)



# METRO

2000 SW First Avenue  
Portland, OR 97201-5398  
(503) 221-1646  
Fax 241-7417

**HAND DELIVERED**

July 24, 1992

Ms. Vicki K. Ervin  
Elections Director  
Multnomah County Elections  
1040 S.E. Morrison Street  
Portland, OR 97214

Executive Officer  
Rena Cusma

Metro Council

Jim Gardner  
Presiding Officer  
District 3

Judy Wyers  
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Susan McLain  
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George Van Bergen  
District 6

Ruth McFarland  
District 7

Tanya Collier  
District 9

Roger Buchanan  
District 10

Ed Washington  
District 11

Sandi Hansen  
District 12

Dear Ms. Ervin:

Re: Metro Greenspaces Ballot Measure  
Resolution No. 92-1639A

Enclosed please find the following documents necessary to file a bond measure for the General Election on November 3, 1992:

1. Metropolitan Service District Resolution No. 92-1639A adopted by the Metro Council on July 23, 1992, which establishes the ballot title for the general obligation bond measure election; and
2. Exhibit "A" to the above Resolution.

If you have any questions, please call me or Don Carlson, Council Administrator.

Yours very truly,

Paulette Allen,  
Clerk of the Council

dr  
1467

Enclosures

Certified A True Copy of the Original Thereof  
*[Signature]*  
Clerk of the Council

BEFORE THE COUNCIL OF THE  
METROPOLITAN SERVICE DISTRICT

FOR THE PURPOSE OF SUBMITTING )  
TO THE VOTERS QUESTIONS OF )  
CONTRACTING A GENERAL )  
OBLIGATION BOND INDEBTEDNESS IN )  
THE AMOUNT OF \$200 MILLION AND )  
AUTHORIZATION TO PROCEED WITH )  
THE FINANCING, ACQUISITION, )  
DEVELOPMENT, OPERATIONS AND )  
MAINTENANCE OF A REGIONAL )  
SYSTEM OF GREENSPACES )

RESOLUTION NO. 92-1639A  
  
Introduced by Rena Cusma,  
Executive Officer and  
Councilor Richard Devlin

WHEREAS, The Metropolitan Service District has taken a leadership role in identifying remaining natural areas in the region and planning for their protection or potential acquisition; and

WHEREAS, Such activities have been and will continue to be coordinated with the affected federal, state, and local governments and citizens in the region; and

WHEREAS, Numerous planning efforts, studies and recommendations have been proposed over the past 90 years to develop a system of interconnected greenspaces for the Portland/Vancouver region; and

WHEREAS, On June 28, 1990, by Resolution No. 90-1261, the Metro Council established a Policy Advisory Committee to assist the Council in coordinating its Natural Areas Planning Program and to develop a regional consensus in the development of a Metropolitan Greenspaces Master Plan; and

WHEREAS, On December 13, 1990, by Resolution No. 90-1344, Metro established a Technical Advisory Committee to assist the

Metro Council in coordinating the Metropolitan Greenspaces Program and Master Plan; and

WHEREAS, On April 29, 1992 a Metropolitan Greenspaces Master Plan Public Review Draft was released for comment through June 15, 1992; and

WHEREAS, On May 28 1992, by Resolution No. 92-1616 the Metro Council stated its intent to adopt a Metropolitan Greenspaces Master Plan; and

WHEREAS, Between April 29 and June 15, 1992 Metro staff have undertaken an extensive public involvement effort to solicit comments on the Master Plan Public Review Draft including:

1. Briefings of the governing bodies of most cities and counties and special parks districts within the Metropolitan Service District Boundary;
2. A series of five public workshops throughout the region;
3. Numerous meetings of the Metropolitan Greenspaces Policy and Technical Advisory Committees;
4. Several meetings with the Greenspaces subcommittee of the Metro City Managers organization;
5. Briefings for the State Agency Council for Growth Issues in the Portland Metropolitan Area, Metro's Regional Policy Advisory Committee, and the Metro City Planning Directors organization;
6. Numerous briefings for civic groups, neighborhood organizations educational and special interest groups.; and

WHEREAS, Significant improvements to the Metropolitan Greenspaces Master Plan have resulted from this review process; and

WHEREAS, The Metro Council adopted the Metropolitan Greenspaces Master Plan by Resolution No. 92-1637; and

WHEREAS, The Metropolitan Greenspaces Master Plan recommends that Metro seek a regional funding mechanism to assemble, through acquisition and other strategies, and develop a regional greenspaces system and also assume operations and management responsibility for components of the system in cooperation with local governments; and

WHEREAS, On July 2, 1992 the Portland Metropolitan Area Local Government Boundary Commission approved Proposal AF-4 allowing Metro to seek voter approval to acquire, develop, maintain, and operate a system of parks, open space and recreational facilities of metropolitan significance, now, therefore,

BE IT RESOLVED,

1. That the Council of the Metropolitan Service District hereby submits to the qualified voters of the District the question of contracting a General Obligation bond indebtedness of \$200 million. The bonds shall mature over a period of not more than 30 years.

2. That the voters of the District shall in the same measure consider the question of whether Metro may finance the acquisition, development, maintenance and operation of a system of parks, open space, and recreational facilities of metropolitan significance pursuant to ORS 268.312 (1)(c).

3. That the measure shall be placed on the ballot for the General election held on the 3rd day of November, 1992.

4. That the District shall cause this Resolution and the Ballot Title Attached as Exhibit "A" to be submitted to the Elections Officer, the Tax Supervising and Conservation Commission, and the Secretary of State in a timely manner as required by law.

5. That the Executive Officer, pursuant to ORS 251.285 and Metro Code Chapter 2.10, shall transmit this measure, ballot title, an explanatory statement and arguments for or against, if any, to the Secretary of State for inclusion in the State Voters' Pamphlet.

ADOPTED by the Council of the Metropolitan Service District this 23rd day of July, 1992.


  
\_\_\_\_\_  
Jim Gardner, Presiding Officer

EXHIBIT A

Bond Measure for Resolution No. 92-1639A

Caption: Bonds to Save Green Spaces and Fund Parks System

Question: Shall Metro acquire green ways, parks, open space, wildlife habitat by issuing two hundred million dollars of general obligation bonds? If the bonds are approved, they will be payable from taxes on property or property ownership that are not subject to the limits of section 11b, Article XI of the Oregon Constitution.

Explanation: Permits Metro to acquire, develop, maintain and operate a regional system of parks, open space and recreation assets. Bonds will mature in 30 years. At least seventy-five percent of bond funds will buy and restore nature parks, trails and green ways. Up to twenty-five percent of bond funds may be used to help parks departments buy and improve local parks. Bond funds will not be used for parks care costs. Estimate of average yearly cost of bonds is 19 1/2 cents per one thousand dollars assessed value.






**METRO**

2000 S.W. First Avenue  
Portland, OR 97201-5398  
503/221-1646

# Memorandum

Date: July 22, 1992  
To: Metro Council  
From: Daniel B. Cooper, General Counsel   
Regarding: GREENSPACES BALLOT MEASURE  
Our file: 7.§1.K

---

The attached version of the Greenspaces Ballot Measure is the result of consultation with bond counsel to arrange the Recommended Bond Measure from the Finance Committee to pass the statutory Flesch test for readability. The only significant word changes are the following: (1) "recreation facilities" in the Question is changed to "wildlife habitat," (2) the statutory language for Metro's new function is pulled together in the first sentence of the Explanation, and (3) "parks maintenance costs" in the Explanation is now "parks care costs." I recommend amendment of Resolution 92-1639A by substituting the attached Exhibit A.

DBC/LS/dr  
1462

Attachment

## EXHIBIT A

**Caption:** Bonds to save green spaces and fund parks system.

**Question:** Shall Metro acquire green ways, parks, open space, wildlife habitat by issuing two hundred million dollars of general obligation bonds? If the bonds are approved, they will be payable from taxes on property or property ownership that are not subject to the limits of section 11b, Article XI of the Oregon Constitution.

**Explanation:** Permits Metro to acquire, develop, maintain and operate a regional system of parks, open space and recreation assets. Bonds will mature in thirty years. At least seventy-five percent of bond funds will buy and restore nature parks, trails and green ways. Up to twenty-five percent of bond funds may be used to help parks departments buy and improve local parks. Bond funds will not be used for parks care costs. Estimate of average yearly cost of bonds is 19 1/2 cents per one thousand dollars assessed value.



July 21, 1992

Jim Gardner, Councilor  
Metropolitan Service District  
2000 S.W. 1st Avenue  
Portland, OR 97201

Dear Mr. Gardner:

Portland General Electric Company encourages Metro Council approval and implementation of the "Metropolitan Greenspaces Master Plan." Urban natural areas play an important part in defining the region's quality of life which in turn contributes to a healthy economy. The Master Plan provides a sound, comprehensive approach to regional greenspace acquisition and management.

I would only point out two areas of concern. First, the proposed west side trail designated as "Powerline Trail" will be difficult to establish. Public use of transmission corridors pose several significant issues including safety, health, liability, and adjacent property trespass concerns. In addition, many powerline corridors are not owned by the utility, but are established by a limited-use easement with private landowners.

Second, in the event Metro considers acquisition of a greenspace through condemnation procedures, the process should be conducted in the context of other land use processes. That is, the Greenspaces Master Plan should not be implemented independent of other land use plans, but coordinated with them.

Metro is to be commended for its leadership in this unprecedented, cooperative effort to establish a "...regional system of natural areas, open space, trails, and greenways, for wildlife and people." Approval of the master plan will help bring the region closer to a liveable future.

Sincerely

A handwritten signature in black ink, appearing to read 'Ron Klein', is written over a horizontal line.

Ron Klein  
PGE Environmental Affairs Coordinator

c: ✓ Richard Devlin



**CHRIS MASS**  
CHRIS MASS - DESIGNER

JULY 15, 1992

RICHARD DEVLIN  
TO: MIKE HUCK  
METRO

RE: GREENSPACES —

AM CURIOUS TO KNOW IF THIS INCLUDES PGE  
RIGHT OF WAY PROPERTY NO. OF SELWOOD BRIDGE  
ALONG THE RIVER AND JUST BELOW OAKS PARK (DIRECTLY  
NO. OF SELWOOD RIVERFRONT PARK)? PGE APPEARS TO  
HAVE NO INTEREST IN IT AND IT HAS BECOME A  
HAVEN FOR DEBRIS, DRUNKS, AND HOMELESS  
CAMPS, INSTEAD OF ~~THE~~ ONE OF THE LAST  
CLOSE TO URBAN REFINES IT COULD BE. BECAUSE IS  
CONSTANTLY LITTERED W/ EMPTY BEER CANS AND HUMAN  
WASTE, MAKING IT LESS THAN CONDUCIVE TO DRUG -  
WALKING, SUNBATHING OR HERON WATCHING -  
WE KNOW SELWOOD IS THE "POOR RELATIONSHIP" OF  
THIS CITY, BUT WE HAVE HOPES...

CHRIS MASS

1903 SE. uMATTILA, PORTLAND, OR 97202  
503...232...8834

July 14, 1992

Eric Engstrom  
1747 SE 47th  
Portland, OR. 97215

Richard Devlin, Chair  
Metro Transportation & Planning Committee  
Metro  
2000 SW First Ave.  
Portland, OR. 97201

Dear Mr. Devlin,

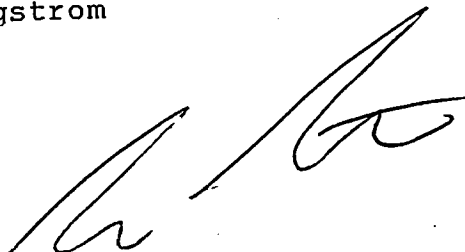
As a resident of Southeast Portland, and a member of the Audubon society, I would like to record my support for the Greenspaces Master Plan. Projected growth in the Portland area demands a region-wide effort to preserve some open spaces and natural areas before they are all gone. Such action is critical if our quality of life in Portland is to be maintained.

The many local governments in the region cannot coordinate such a plan with out Metro's region-wide perspective. Metro's role in the Greenspaces Program should be coordinated with Metro's other efforts in Transportation and planning for the urban growth boundary. Good regional inter-disciplinary planning and coordinated action will result in more efficient government services.

As someone who uses public transit as my major mode of transportation, I am especially concerned that adequate natural areas are protected within the Metro area. I would like to note that if getting more people to use public transportation is a Metro goal, then Metro must help insure that potential recreational areas within the Metro region (and thus accessible by bus) don't all get turned into housing developments.

Sincerely,

Eric Engstrom






**METRO**

2000 S.W. First Avenue  
Portland, OR 97201-5398  
503/221-1646

# Memorandum

*Council*  
*7/23/92*  
*6.2*

Date: July 22, 1992  
To: Metro Council  
From: Daniel B. Cooper, General Counsel   
Regarding: GREENSPACES BALLOT MEASURE  
Our file: 7.§1.K

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DBC/LS/dr  
1462

Attachment

## EXHIBIT A

**Caption:** Bonds to save green spaces and fund parks system.

**Question:** Shall Metro acquire green ways, parks, open space, wildlife habitat by issuing two hundred million dollars of general obligation bonds? If the bonds are approved, they will be payable from taxes on property or property ownership that are not subject to the limits of section 11b, Article XI of the Oregon Constitution.

**Explanation:** Permits Metro to acquire, develop, maintain and operate a regional system of parks, open space and recreation assets. Bonds will mature in thirty years. At least seventy-five percent of bond funds will buy and restore nature parks, trails and green ways. Up to twenty-five percent of bond funds may be used to help parks departments buy and improve local parks. Bond funds will not be used for parks care costs. Estimate of average yearly cost of bonds is 19 1/2 cents per one thousand dollars assessed value.



# MULTNOMAH COUNTY OREGON

---

DEPARTMENT OF ENVIRONMENTAL SERVICES  
PARKS SERVICES DIVISION  
1620 S.E. 190TH AVE.  
PORTLAND, OREGON 97233  
(503) 248-5050

BOARD OF COUNTY COMMISSIONERS  
GLADYS McCOY • CHAIR OF THE BOARD  
PAULINE ANDERSON • DISTRICT 1 COMMISSIONER  
GARY HANSEN • DISTRICT 2 COMMISSIONER  
RICK BAUMAN • DISTRICT 3 COMMISSIONER  
SHARRON KELLEY • DISTRICT 4 COMMISSIONER

---

July 23, 1992

Metro Council  
2000 SW First Ave.  
Portland, OR 97201-5398

RE: Testimony Favoring Adoption of the "Metropolitan Greenspaces Master Plan"

Dear Councilors:

Thank you for this opportunity to present testimony regarding the Greenspaces Master Plan. On behalf of Multnomah County, I am pleased to convey our whole-hearted support.

As you know, the document before you is the product of nearly three years of work involving many of the jurisdictions within your district boundaries as well as a substantial number of state and federal agencies, nonprofit organizations, natural resource professionals, and concerned citizens.

Involvement of numerous stakeholders has contributed to the development of a plan which is comprehensive in nature, scientifically sound and responsive to the needs and desires of our regional community.

During the last twenty years, the population of the tri-county area increased by approximately 34%. Each of us has witnessed the impacts of this growth on open space, fish, wildlife and recreational resources. Few, if any, would argue that the impacts have been beneficial for the resources or our quality of life.

Without question, population will continue to grow, probably at a rate more vigorous than the last twenty years. The choice we face is simple: act now to acquire and protect natural areas or sacrifice a major element in the formula that makes this region a unique and attractive place to live, work and recreate--the opportunity for daily contact with nature.



Like most jurisdictions in the region, Multnomah County has been preoccupied with reacting to the problems associated with growth such as law enforcement, transportation, and social services. This preoccupation, coupled with growing financial constraints, has limited our ability to be proactive in the area of open space acquisition and protection. Consequently, we have looked to Metro to address this important need. The Greenspaces Plan is a meaningful first step.

It is our hope that you will enthusiastically endorse this plan tonight and then embark on an aggressive effort to educate the citizens of the region about the benefits and costs associated with implementation.

As was the case with the formulation of the Greenspaces Master Plan, Metro can count on Multnomah County's full cooperation, support and assistance in transforming plan concepts into reality.

Again, thank you for the opportunity to share our views.

Sincerely,



Sharron Kelley  
Commissioner



Charles Ciecko, Director  
Parks Services Division

CC:emg

4919p

The **Wetlands** Conservancy

July 17, 1992

Mr. Richard Devlin  
METRO Councilor  
2000 SW. First Avenue  
Portland, OR 97201-5398

Dear Richard,

**SUBJECT: GREENSPACES PROGRAM**

In my July 14, 1992, testimony before the Transportation Committee, I stressed that the Greenspaces Program was not a "taking" situation, and that we sought to deal only with willing sellers. I, unfortunately, made this point very strongly because that is the way I feel, but I was wrong since the Master Plan does say that condemnation might be used as a last resort (Tim Ramis' testimony that followed mine).

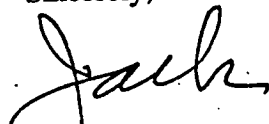
I voted with the others unanimously at the last Policy Advisory Committee (PAC) meeting approving the Master Plan, but I have always felt that condemnation or any absolute regulatory control of potential greenspaces purchases that might incite a "takings" claim should not be part of this program.

We need to move the Greenspaces Program forward with an absolute minimum of contention or opposition. Even a perceived "taking" of someone's land or the apparent use of the condemnation process, can be just enough of a detraction to the process and basic purpose of the plan, to cause it to lose favor in the eyes of enough voters to cause a loss in November.

We cannot take this chance. I urge you and the METRO Council and legal staff to find some way to purge the condemnation process from the Master Plan. I am truly sorry that I did not make more of this issue with the PAC. I did bring it up at one time, but then seemed to drop it. Too bad, because I firmly believe that we should only be dealing with willing sellers if we are going to have and retain region-wide support.

I hope some changes can be made.

Sincerely,



Jack Broome

JBroome:bl



O'DONNELL, RAMIS, CREW & CORRIGAN

ATTORNEYS AT LAW  
BALLOW & WRIGHT BUILDING  
1727 N.W. Hoyt Street  
Portland, Oregon 97209

TELEPHONE: (503) 222-4402  
FAX: (503) 243-2944

DATE: July 23, 1992  
TO: The Honorable Jim Gardner, Presiding Officer  
Counselors of the Metropolitan Service District  
FROM: James M. Coleman  
RE: Suggested Amendments to Greenspaces Masterplan

I represent the Peterkort family who own the land on which the Westside Light Rail Sunset Transit Center is located. On behalf of the Peterkorts, I provide the following suggested amendments which will address the concerns the Peterkorts have expressed consistently through their past participation in this process, and the request made by Jack Broome of the Wetlands Conservancy in his July 17 letter.

1. On page 72, amend policy No. 2.25 to read:

"Make funding decisions consistent with the priorities of the Greenspaces Masterplan, acquisition, and capital improvements plans. Funds for acquisition under this masterplan may be used (1) to acquire land set aside to satisfy Goal 5 in local comprehensive plans and (2) to purchase identified land from willing sellers. Funds shall not be used to purchase land from unwilling sellers unless the local comprehensive plan already calls for the preservation of land in order to satisfy Goal 5.

JMC:bjd  
jmc\memo\greensp.me2

---

**METRO*****Greenspaces***

Planning Department  
2000 S.W. First Avenue  
Portland, OR 97201-5398  
(503) 221-1646

---

**DATE:** July 23, 1992

**TO:** Metro Executive Officer and Council

**FROM:** Greenspaces Planning Team

**SUB:** Letters of Comment on the Greenspaces Master Plan and Bond Measure Referral

Attached are written comments received from:

1. U.S. Fish and Wildlife Service
2. Oregon Parks and Recreation Department
3. Oregon Department of Fish and Wildlife
4. Clackamas County
5. North Clackamas Parks & Recreation District
6. City of Lake Oswego
7. Wilsonville City Councilor
8. Friends of Goal 5
9. Jack Broome, The Wetlands Conservancy
10. Leeanne MacColl

**Attachments**

H:July 23,92.mh



# United States Department of the Interior

## FISH AND WILDLIFE SERVICE

Portland Field Station  
2600 S.E. 98th Avenue, Suite 100  
Portland, Oregon 97266

July 22, 1992

METRO Council  
2000 S.W. First Avenue  
Portland, Oregon 97201

Dear Councilors:

Participating with Metro staff in the development of the Metropolitan Greenspaces Master Plan has been a privilege as well as an exciting opportunity for the U.S. Fish and Wildlife Service. The Metropolitan Greenspaces Plan illustrates a sensitivity to local development concerns as well as a commitment to biological diversity through habitat protection and restoration. The Service fully endorses adoption of the Master Plan!

Metro and participating local governments have a unique opportunity to manage natural systems from an ecosystems perspective and create a model for stewardship. By adopting a metropolitan-wide protection plan you can simplify the development process. By acquiring remnant greenspaces you can insure a sustained quality of life for area residents. By implementing environmentally sensitive and biologically sound growth and development standards, you actively participate in the maintenance of native plant and animal communities.

The Portland metropolitan region provides the setting and the opportunity to preserve habitat values for a diverse assemblage of species which depend on wetlands, riparian corridors, agricultural "edges", and Douglas fir forests. Site-specific consideration of unique habitats areas, such as the Heron Lakes and Ross Island rookeries, will insure the continued presence of a "visible" species that gives Portland its unique identity and "sense of place" for residents and visitors.

The Service recognizes the efforts taken by Metro staff to integrate ecological and economic considerations into the local development process. We commend project participants for developing an exceptional visionary document that integrates ecological, economic, and social considerations for the management of remaining natural areas within the region.

The Fish and Wildlife Service fully supports jurisdictional corroboration in protection and restoration of natural areas throughout Oregon. To achieve a national net gain in fish and wildlife populations and retain the functions of the systems which support them, a cooperative and coordinated effort by local, State, and Federal agencies, private landowners, and non-governmental organizations will be required. The Service encourages the Metro Council to adopt the Metropolitan Greenspaces Plan and to support the interim protection

of natural habitat sites until they are acquired or until specific development standards are adopted to adequately protect those which will inevitably be developed.

Sincerely,

A handwritten signature in cursive script, appearing to read "Russell D. Peterson". The signature is written in dark ink and is positioned above the typed name.

Russell D. Peterson  
Field Supervisor

PW:jc/metropln

July 21, 1992



DEPARTMENT OF  
FISH AND  
WILDLIFE

Richard Devlin, Chair  
Metropolitan Service District  
2000 SW 1st Ave.  
Portland, Oregon 97201

Dear Mr. Devlin:

The Department of Fish & Wildlife would like to offer its' support for Metro's Master Planning effort and the Greenspaces program. We have just begun a program called **Naturescaping** which compliments the goals set forth in Greenspaces. Basically, **Naturescaping** means landscaping property to attract wildlife. Through classes offered by department volunteers, we will encourage people to preserve, enhance and create wildlife habitat in their backyards. It is designed to educate and inform citizens about the consequences of habitat loss, and give them an opportunity to create their own wildlife oasis - to help rewilderness the city.

Goals for Greenspaces and Naturescaping are very closely aligned. They are both for wildlife and people, instill a daily sense of stewardship, occur within our living and working spaces, enhance habitat that remains, incorporate native plants, identify backyards that provide a link to the larger system, involve restoration efforts in neighborhoods that have been intensely urbanized, and promote and encourage citizen awareness and involvement in active habitat stewardship.

We look forward to coordinating with your efforts and making Greenspaces information and programs available to all participants in our Naturescaping program.

Yours truly,

A handwritten signature in cursive script that reads "Barbara Hutchison".

Barbara Hutchison  
Public Affairs, Director



2501 SW First Avenue  
PO Box 59  
Portland, OR 97207  
(503) 229-5400

DATE: July 10, 1992

TO: Ann Squier  
Senior Policy Advisor

FROM: Marguerite Nabeta  
Outdoor Recreation Planner

SUBJECT: Metropolitan Greenspaces Program  
Master Plan Adoption

After several years of incredible citizen participation and hard work, METRO staff has completed the draft master plan for this program. Doug Cottam, Oregon Department of Fish and Wildlife and I have been participating as members of the policy advisory committee for the program. Other state agency participants on additional committees include: Jack Wiles, Region 1 parks supervisor and Pete Bond, state Trails Coordinator.

The final hearing for adoption of the plan is July 23, 1992. Mel Huie from METRO staff and I feel that it would be very beneficial to either have you or another representative testify or provide a letter of support for the program from the Governor's office at that hearing. Please contact Mel at 220-1186 to arrange for a time certain to present at the hearing or make other suitable arrangements.

This is a tremendous project that has the potential to assist the jurisdictions in the METRO area to meet the need for an adequate resource base of Greenspaces in the future. It has been a challenge for METRO to bring so many jurisdictions together for this common cause.

Call me at 378-6378 if you have any questions.

c: Steve Brutscher  
Mel Huie





BEFORE THE BOARD OF COUNTY COMMISSIONERS  
OF CLACKAMAS COUNTY, STATE OF OREGON

In the Matter of Approving  
the Metropolitan Greenspaces  
Master Plan

RESOLUTION NO.: 92 -  
Page 1 of 1

WHEREAS, it is recognized that greenspaces contribute to the livability of Clackamas County, as the County and Portland Metropolitan Region grow existing greenspaces are increasingly threatened with development, and protection of greenspaces would enhance the quality of life for existing and future residents of Clackamas County and the Portland Metropolitan Region; and

WHEREAS, County Commissioners and staff, Metro, local service providers, community organizations and the public have for approximately three years jointly sought to develop a plan to protect greenspaces to help ensure the future livability of our community; and

WHEREAS the Technical Advisory Committee and Political Advisory Committee, both made up of representatives from various sectors of the community, as well as other advisory committees, have advised Metro staff on an ongoing basis with regard to the contents of the plan and have recommended a master plan which provides a vision shared by many and provides an appropriate planning context; and

WHEREAS a draft of this master plan has been presented to all cooperating jurisdictions, a number of property owners, businesses, and community organizations, and their comments and concerns have been incorporated as appropriate;

NOW, THEREFORE IT IS HEREBY RESOLVED AND ORDERED that Clackamas County Board of Commissioners accepts and approves the Metropolitan Greenspaces Master Plan as a guide for further policy action, and recommends it, together with the public review record, to the Metro Council for their approval and further action.

DATED this 17th day of July, 1992

BOARD OF COUNTY COMMISSIONERS

Judie Hammerstad  
Judie Hammerstad, Chairperson

Darlene Hooley  
Darlene Hooley, Commissioner

Ed Lindquist  
Ed Lindquist, Commissioner



# CLACKAMAS COUNTY

Board of Commissioners

July 17, 1992

The Honorable Jim Gardner  
Presiding Officer of the Metro Council  
METRO  
2000 SW First Avenue  
Portland, OR 97201-5398

JUDIE HAMMERSTAD  
CHAIR

DARLENE HOOLEY  
COMMISSIONER

ED LINDQUIST  
COMMISSIONER

MICHAEL F. SWANSON  
CHIEF EXECUTIVE OFFICER

Dear Councilor Gardner:

The "Metropolitan Greenspaces Master Plan" presents an exciting vision for the future of the region. We encourage the Metro Council to approve the "Metropolitan Greenspaces Master Plan" at their meeting on July 23, 1992. The protection of greenspaces is vital to the livability of our community.

We are pleased to have assisted in the development of such a worthwhile plan and look forward to continued participation in the Greenspaces Program. We share the enthusiasm of the cities in the County regarding both the regional plan and the method for distribution of funds to local service providers. We look forward to working together with Metro and other cooperators to implement the Greenspaces vision to help ensure a healthy and livable community of which we are proud.

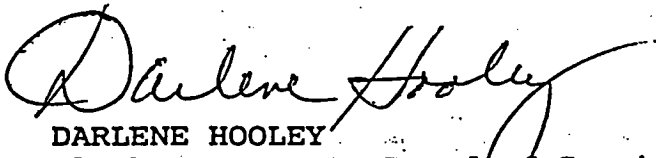
Commendation is deserved for all who have participated in development of the plan, including Metro staff, local jurisdictions and the public. The revised plan, recommended by the Greenspaces Political Advisory Committee on July 18th, reflects the foresight, stewardship and cooperation of all involved in the process of developing the plan.

We will share the plan with the public in Clackamas County and encourage citizens to be informed of the contents of the plan and vote in November.

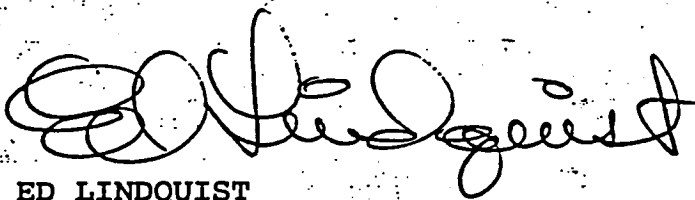
Sincerely,



JUDIE HAMMERSTAD  
Chairperson, Clackamas County Board of Commissioners  
Board of Directors, North Clackamas Parks and Recreation District



DARLENE HOOLEY  
Clackamas County Board of Commissioners  
Board of Directors, North Clackamas Parks and Recreation District



ED LINDQUIST  
Clackamas County Board of Commissioners  
Board of Directors, North Clackamas Parks and Recreation District

c: Richard Devlin, Metro  
Pat Lee, Metro  
Mel Huie, Metro  
Roger Brown, North Clackamas Parks and Recreation District  
Dan Zinzer, Clackamas County Parks

grnsp/support17/92



**NORTH  
CLACKAMAS**  
PARKS & RECREATION  
DISTRICT

July 23, 1992

Mr. Mel Huie  
METRO  
2000 SW First Avenue  
Portland, OR 97201-5398

Dear Mel:

Since I will be unable to be in attendance at the METRO council meeting on July 23, I want to go on record for the Regional Parks Advisory Board of the North Clackamas Parks and Recreation District our full support for the Greenspaces Program.

The Board believes that this is a unique opportunity to make a substantial commitment toward continuing and enhancing the quality of life for the people who live in the METRO area. If we are successful in this effort, we will assure our citizens that our community will continue to be a desirable place in which to live and work.

It has been a pleasure to work with you and the staff of METRO in the development of the Greenspaces Program. You can count on our Park District for support as we work cooperatively with Clackamas County Parks and the cities within Clackamas County in the provision of information that will enable voters to make an informed choice for the protection of green spaces and enhancement of our quality of life in the November election.

Sincerely,

Roger K. Brown  
Director

RKB:js

cc: Dan Zinzer, Clackamas County Parks  
Board of County Commissioners, Clackamas County



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DEPARTMENT OF PLANNING AND DEVELOPMENT

---

July 9, 1992

Mel Huie  
METRO Greenspaces Program  
2000 SW First Avenue  
Portland, OR 97201-5398

Dear Mel:

RE: City of Lake Oswego's Participation in Allocation of Local Share of Greenspaces Bond Revenue

Please find enclosed a signed and notarized copy of Resolution 92-30 that affirms the City's participation as per the formula worked out with Clackamas County and the other County jurisdictions.

If you have any questions or if I can be of further service, please do not hesitate to call me at 697-7421.

Best Regards,

Ron Bunch, AICP  
Senior Planner

pc: Dan Zinzer, Clackamas County Parks Administrator  
file

RESOLUTION 92-30

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF LAKE OSWEGO SUPPORTING THE PROPOSED DISTRIBUTION OF LOCAL GREENSPACES FUNDS IF THE METRO BOND MEASURE IS SUCCESSFUL IN NOVEMBER, 1992.

WHEREAS, the City of Lake Oswego and Clackamas County and other Clackamas County cities are desirous of obtaining funding for open space acquisition; and

WHEREAS, it is necessary for the City and Clackamas County and other Clackamas County cities to agree on a distribution formula;

NOW, THEREFORE, BE IT RESOLVED by the City Council of the City of Lake Oswego that:

Section 1. The City of Lake Oswego supports the proposed distribution of local greenspaces funds as outlined in Attachment A, attached hereto as Exhibit "A" and incorporated herein by reference.


Considered and enacted by the City Council of the City of Lake Oswego at a regular meeting held on the 7th day of July, 1992.

AYES: M. ANDERSON, HOLSTEIN, MARCOTTE, SCHLENKER, D. ANDERSON, PUSKAS

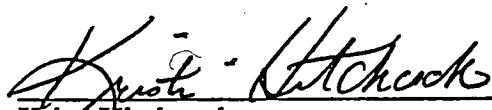
NOES: NONE

EXCUSED: CHRISMAN..

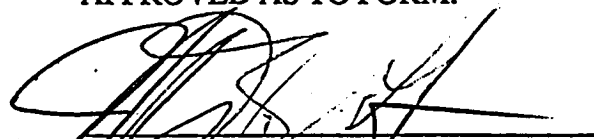
ABSTAIN: NONE

  
\_\_\_\_\_  
Alice L. Schlenker  
Mayor

ATTEST:

  
\_\_\_\_\_  
Kristi Hitchcock  
City Recorder

APPROVED AS TO FORM:

  
\_\_\_\_\_  
Jeffrey G. Condit  
City Attorney

[Ron92.1]<corres>R92-30

I, Kristi Hitchcock, recorder of the City of Lake Oswego do hereby certify that the foregoing is a true and correct copy of the original thereof in the files of the recorder's office of the City of Lake Oswego.

  
\_\_\_\_\_  
Kristi Hitchcock  
City Recorder



# CLACKAMAS COUNTY

Department of Transportation & Development

## ATTACHMENT "A"

WINSTON KURTH  
EXECUTIVE DIRECTOR

RICHARD DOPP  
DIRECTOR  
OPERATIONS & ADMINISTRATION

TOM VANDERZANDEN  
DIRECTOR  
PLANNING & DEVELOPMENT

## MEMORANDUM

TO: Ron Bunch, City of Lake Oswego  
Ron Parch, City of Gladstone  
Ken Worcester, City West Linn  
Don Robertson, City of Milwaukie  
Roger Brown, North Clackamas Park & Recreation District  
Verne Scholtz, City of Happy Valley  
Kate Daschell, City of Oregon City  
Pam Emmons, City of Wilsonville

FROM: Dan Zinzer, Park Administrator  
Clackamas County Parks

DATE: June 24, 1992

SUBJECT: Distribution agreements from June 24, 1992 Meeting

In our meeting of June 24, 1992, it was agreed that we would recommend the following positions to our respective elected officials.

1. Participating Cities and the County should develop the formula for local distribution of Greenspaces funds if the bond measure is successful in November 1992.
2. Population and assessed value should be considered equally in the distribution formula.
3. The County's population and assessed value distribution will not include the areas served by participating cities or the North Clackamas Park and Recreation District.
4. The most recent figures from the 1991-92 assessment rolls, and the 1991 P.S.U. population count will be a fair basis for determining the distribution.
5. Distribution for those Cities included in more than one county will be based on the population and assessed value that lies within Clackamas County.

I have attached a spread sheet based on these conclusions. Please share this information with the appropriate parties. We need to contact Metro with our local distribution formula by July 6, 1992. Written resolutions can follow later in July.

Thank you all for the cooperative spirit in our discussions. I feel this distribution formula not only shows that we are able to work together but truly represents a fair distribution for all of the citizens who will be participating in the Greenspaces Program.

POPULATION BASED ON 1991 P.S.U. CERTIFIED POPULATION ESTIMATES  
 ASSESSED VALUE IS ACTUAL FOR CURRENT TAX YEAR  
 TOTAL COUNTY ALLOCATION OF \$10,851,500.00 (1)

JURISDICTION	POPULATION	PERCENT DISTRIBUTION POP. 50%	ASSESSED VALUE	PERCENT DISTRIBUTION A.V. 50%	TOTAL	PERCENT
*****	*****	*****	*****	*****	*****	*****
CPRD	57,197	21.29%	\$1,155,106	20.07%	\$1,089,060	\$2,244,166 20.68%
LADSTONE	10,420	3.88%	\$210,434	2.35%	\$127,506	\$337,940 3.11%
APPY VALLEY	1,650	0.61%	\$33,322	0.78%	\$42,146	\$75,468 0.70%
LAKE OSWEGO	29,254	10.89%	\$590,791	16.76%	\$909,334	\$1,500,125 13.82%
CLWALKIE	19,450	7.24%	\$392,797	6.59%	\$357,607	\$750,404 6.92%
REGON CITY	16,760	6.24%	\$338,472	4.39%	\$238,315	\$576,787 5.32%
EVERGROVE	267	0.10%	\$5,392	0.10%	\$5,444	\$10,836 0.10%
EAST LINN	17,160	6.39%	\$346,550	6.83%	\$370,755	\$717,305 6.61%
ELSONVILLE	8,755	3.26%	\$176,809	5.39%	\$292,338	\$469,147 4.32%
HALATIN	2,025	0.75%	\$40,895	1.05%	\$56,769	\$97,664 0.90%
ORTLAND	710	0.26%	\$14,339	0.37%	\$20,268	\$34,606 0.32%
CLACKAMAS COUNTY	105,017 (2)	39.09%	\$2,120,842	35.32%	\$1,916,208	\$4,037,050 37.20%
TOTAL	268,665 (3)	100.00%	\$5,425,750	100.00%	\$5,425,750	\$10,851,500 100.00%

- (1) \$10,851,500.00 is an estimated allocation based on a region distribution using 50% population and 50% assessed value for the urban portion of Clackamas County
- (2) Does not include any incorporated Cities
- (3) Actual total population including Cities outside the U.G.B. is 288,700





**WFOG5 FRIENDS OF GOAL FIVE**  
*"Protecting Wilsonville's Natural Areas"*

DATE: JULY 23, 1992  
TO: THE METRO COUNCIL  
FROM: CHARLOTTE LEHAN  
WILSONVILLE CITY COUNCILOR  
RE: METRO GREENSPACES PROGRAM

My name is Charlotte Lehan. I reside at 29786 SW Lehan Court in Wilsonville. I am a City Councilor with the City of Wilsonville and I am one of the founders of an advocacy group called Friends of Goal Five. LCDC Goal #5 is the statewide land use planning goal protecting natural areas and open spaces. Since I cannot attend the hearing tonight to testify, I am writing to enter my support of the Metro Greenspaces program and to stress the importance of a regional cooperative approach to open space planning.

As a member of Friends of Goal Five, I am well aware of the environmental benefits of a regional plan. Sensitive habitats, especially streams and watersheds don't always stay neatly within political boundaries. The functioning of a whole habitat system may depend on critical areas which lie in a different jurisdiction. In addition, a system of wildlife corridors is important to allow daily and seasonal movement of everything from deer to salamanders. Without a regional plan to protect these corridors, wildlife are forced into isolated pockets which can result in decreased genetic diversity and increased vulnerability.

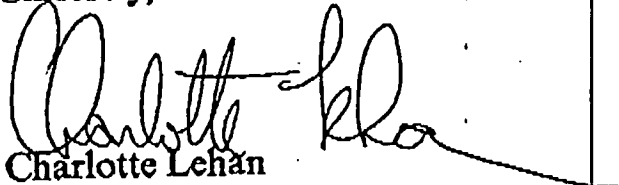
As a City Councilor, I am also aware of the political realities which make a regional Greenspaces program important. Smaller communities, don't always have the expertise to identify and manage particular habitats which may have truly unique features important to the whole region. Secondly, important natural areas are not evenly distributed. One city may have a large percentage of land with significant wetlands, for instance, where another city may have relatively little. Thus, the burden of acquisition and protection may be too great for some smaller jurisdictions, even though the benefit may be region wide.

P.O. Box 128  Wilsonville, Oregon 97070  Phone 503/682-0620  Fax 503/638-1702

Finally, there is the "Quality of Life " issue which we as Cities, Counties, the tourist industry, and the business community promote in the interest of economic development. The standard Chamber of Commerce promotional video rarely advertises convenient streets, strip malls, and parking lots. Instead it shows parks, open space, viewpoints, trees, natural features, and people enjoying them. Unfortunately, once the "Quality of Life" video is produced we are often less than vigilant in protecting those very features which we base much of our regional pride, reputation, and economy upon. Without that vigilance now, most of our opportunities for greenspace protection may disappear by the turn of the century.

Last year the Wilsonville City Council passed Resolution #830 in unanimous support of a regional Greenspaces program. I encourage Metro to continue to play a leading role in support of a Greenspaces program the whole region can be proud of - now, and for the many generations who follow.

Sincerely,

  
Charlotte Lehan



**FOG5 FRIENDS OF GOAL FIVE**  
"Protecting Wilsonville's Natural Areas"

P.O. Box 128 Wilsonville, Oregon 97070

To: Metro Council

July 23, 1992

Regarding: Metro Greenspaces

Metro Greenspace's program to protect open spaces is on the right track. If accomplished it will add a dimension to the Metro area that will insure for generations to come wild and beautiful lands. These areas will be accessible for people to enjoy nature in our own "backyard".

Protection of habitat is great for all animals and plants but it is also great for Portland. Please help us build on our environmental reputation by supporting Metro Greenspaces.

Sincerely,

Steven C. Benson, Chairman

The **Wetlands** Conservancy

July 17, 1992

Mr. Richard Devlin  
METRO Councilor  
2000 SW. First Avenue  
Portland, OR 97201-5398

Dear Richard,

**SUBJECT: GREENSPACES PROGRAM**

In my July 14, 1992, testimony before the Transportation Committee, I stressed that the Greenspaces Program was not a "taking" situation, and that we sought to deal only with willing sellers. I, unfortunately, made this point very strongly because that is the way I feel, but I was wrong since the Master Plan does say that condemnation might be used as a last resort (Tim Ramis' testimony that followed mine).

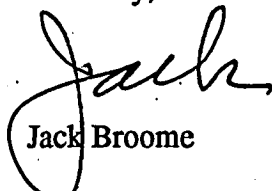
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We need to move the Greenspaces Program forward with an absolute minimum of contention or opposition. Even a perceived "taking" of someone's land or the apparent use of the condemnation process, can be just enough of a detraction to the process and basic purpose of the plan, to cause it to loose favor in the eyes of enough voters to cause a loss in November.

We cannot take this chance. I urge you and the METRO Council and legal staff to find some way to purge the condemnation process from the Master Plan. I am truly sorry that I did not make more of this issue with the PAC. I did bring it up at one time, but then seemed to drop it. Too bad, because I firmly believe that we should only be dealing with willing sellers if we are going to have and retain region-wide support.

I hope some changes can be made.

Sincerely,



Jack Broome

JBroome:bl



Leanne Y. MacCall  
2620 S.W. Georgian Place  
Portland, Ore. 97201

To The Metro Council  
Re. Metropolitan Greenspace Bond Measure

I would like to lend my voice of support to the many others who have expressed their desire to see the remaining large areas of open space acquired and protected for the hopefully many generations to follow.

As Tony Hiss pointed out so well in his book The Experience of Place, "The health of individual people is dependent on their environment... and our health and well being are affected by what we can experience in place."

Part of what makes our metropolitan area so attractive and so livable are the areas of green open space, the proximity of walking trails, the opportunities for families to share a day in the park, and to just get away from the noises of the city. Or as Tony Hiss might say - to restore our stressed-out psyches.

We have the chance now to protect this lifestyle. And we must look down the road and try to visualize what the metropolitan area will look like if we don't do this now.

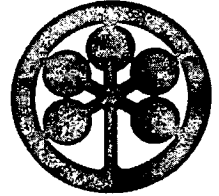
Returning a portion of the bond proceeds to the local park and recreation systems is a good idea and will help lend support from other jurisdictions.

It's a bold idea and will take a great deal of convincing the average voter that the extra tax burden will return rewards far in excess of the cost. Oregon leads the nation in so many areas such as environmental protection, housing and energy conservation. Why not protection of our irreplaceable natural areas?



CITY OF PORTLAND  
BUREAU OF PARKS AND RECREATION

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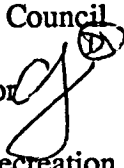


MIKE LINDBERG, Commissioner

CHARLES JORDAN, Director

July 23, 1992

TO: Rena Cusma, Metro Executive Officer, and  
Members of the Metro Council

FROM: Charles Jordan, Director   
City of Portland  
Bureau of Parks and Recreation

RE: Metro Greenspaces

The planning is complete, it's time to act. The Metropolitan Greenspaces Master Plan provides the region with an inspiring vision of the region's future. With its comprehensive program for protecting greenspaces in the Portland-Vancouver region, the Master Plan responds to the frightening reality that an additional 500,000 people will join us in the next 30 years.

You have our support as you adopt the Master Plan. I am proud to say that we have been a partner with you in its development. The Master Plan is comparable to the Olmsted report of 1903, for like the Olmsted report, it is forward thinking. It is the blueprint that now challenges us to live up to the potential offered by our beautiful landscape. It is our chance to earn the thanks of those people who follow us and live in this region 30, 50 and 100 years from now.

You also have our support for the proposed \$200,000,000 greenspaces bond measure. We recognize that this is a major investment to ask our citizens to make. But we believe that the citizens of our region will respond with their approval. They know that now is the time to ensure the future of greenspaces. We are comfortable with the local share formula. We pledge to be an active partner with Metro Greenspaces and intend to use the majority of this amount to meet local greenspace needs.

Thanks to Metro and to all the local jurisdictions who have worked cooperatively on this Plan. Over the course of the last two years we have worked well together. We have gotten

to know one another and we have had candid discussions about the direction we should take. We have even begun to think as a region, considering what is best for all of us, not just our individual agencies.

Thanks to the citizens who have participated in the process. We have learned that our citizens have passionate feelings about their open spaces and natural landscapes. And through the site nomination process, we have discovered greenspaces large and small that enrich the lives of people as well as provide habitat for fish and wildlife.

We look forward to continuing our work as a partner within the Metro Greenspaces Program. We must succeed in this effort and we congratulate you for your leadership.



CITY OF  
**PORTLAND, OREGON**  
OFFICE OF PUBLIC AFFAIRS

Mike Lindberg, Commissioner  
1220 S.W. Fifth Ave.  
Portland, OR 97204  
(503) 823-4145

July 23, 1992

METRO Councilors  
2000 S.W. First Avenue  
Portland, Oregon 97201

Dear Councilors:

As the Portland City Commissioner in charge of the Bureau of Parks and Recreation, and as one involved and active in the development of the Metropolitan Greenspaces program since its inception, I request your support for the following:

- . adoption of the Greenspaces Masterplan;
- . referral of the General Obligation Bond to the voters in the fall; and
- . continuing efforts to identify operation and maintenance funds for this Greenspaces program.

The Portland City Council has repeatedly expressed its support for the Greenspaces program. In May 1990, the Council passed a resolution supporting the Greenspaces planning effort and its regional approach. This spring, the Council conducted an informal review of the draft masterplan and, again, enthusiastically endorsed the effort and the need to take steps now to preserve our remaining natural area systems. The City has also demonstrated its support by providing staffing and financial resources to the Greenspaces program for the past three years.

Under METRO's guidance, we have succeeded as a region in working cooperatively in identifying our valuable natural area systems. And even more importantly, we have crafted a plan and strategy to protect and preserve these systems.

This has been an exemplary process where jurisdictions throughout the region have come together along with citizens, friends groups, and resource agencies. You have before you a consensus document which deserves your serious attention. I honestly believe that we will not have another chance to save the Greenspaces which we have come to rely on and take for granted.

Many people refer to the stewardship and the legacy left to us by the 1903 Portland Park Board in adopting the Olmsted Brothers Report. It outlined a system of parkways, boulevards, and parks for the City. Their foresight has given us Forest Park, Terwilliger Blvd., Mt. Tabor, Powell Butte, etc.



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I myself like to refer back to the cultural wisdom of our Native American people who hold a deep respect for this earth and its interrelationships. Their wisdom and stewardship lies in not concentrating on themselves or their generation, but in thinking of the continuing generations of their families, their grandchildren, and those yet to be born.

We must do the same. Please adopt this Greenspaces Masterplan and refer the General Obligation Bond measure to the voters.

Sincerely,

A handwritten signature in black ink that reads "Mike Lindberg". The signature is written in a cursive, flowing style with a prominent underline at the end.

MIKE LINDBERG  
Commissioner  
Office of Public Affairs

MDL:lmd