



# Agenda

Meeting: Natural Areas and Capital Program Performance Oversight Committee  
 Date: March 3, 2022  
 Time: 4:00 – 5:30 p.m.  
 Place: Zoom:  
<https://us02web.zoom.us/j/83562243944?pwd=bHhKT3hCeGRUWE1jbElVWk03NWZjZz09> / Webinar ID: 835 6224 3944 / Passcode: 486267 / Telephone: +1 253 215 8782

Purpose: Report back from small group sessions in last meeting, review possible workplan for 2022 committee work.

Outcome(s): Solidify key takeaways for year one report; build agreement on workplan for 2022.

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Testimony: A period for public comment will be provided during this meeting. If you would like to provide testimony:

- Submit written testimony by emailing [parksandnaturebond@oregonmetro.gov](mailto:parksandnaturebond@oregonmetro.gov). Testimony received by 5 p.m. the day before the meeting will be shared with the committee in advance. All written testimony received will be added to the meeting record. Written testimony received after the 5 p.m. deadline will be shared with the committee after the meeting.
  - Those wishing to testify orally are encouraged to sign up in advance by either: (a) contacting the Program Assistant by email at [parksandnaturebond@oregonmetro.gov](mailto:parksandnaturebond@oregonmetro.gov) and providing your name and the agenda item on which you wish to testify or (b) if time permits you may be able to testify without prior notice by letting the facilitator know during the public testimony period in the virtual meeting.
  - Individuals will have three minutes to testify unless otherwise stated at the meeting.
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4:00 p.m. Welcome

4:15 p.m. Committee business

4:20 p.m. Public Comment

4:30 p.m. Small Group Report Out

4:45 p.m. Discussion: Key themes and overlap

5:00 p.m. Discussion: Workplan for 2022

5:25 p.m. Next steps

5:30 p.m. Adjourn

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#### សេចក្តីជូនដំណឹងអំពីការមិនរើសអើងរបស់ Metro

ការការពារសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលបានកម្មបញ្ជីរើសអើងសូមចូលទស្សនាគេហទំព័រ [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights)។ បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសាដទៃទៀត ឬប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (រវាង 8 ព្រឹកដល់រវាង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំពីរថ្ងៃ ថ្ងៃធ្វើការ មុនថ្ងៃប្រជុំដើម្បីអាចឱ្យគេបកប្រែសម្រាប់លោកអ្នក ។

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# Meeting recording links



**Metro**

600 NE Grand Ave.  
Portland, OR 97232-2736

Meeting: Natural Areas and Capital Program Performance Oversight Committee  
Date: March 3, 2022  
Time: 4:00 – 5:30 p.m.  
Place: Zoom  
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Outcome(s): Solidify key takeaways for year one report; build agreement on workplan for 2022.

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**Meeting recording link for meeting packet:**

<https://vimeo.com/684750150/f1956a3edc>

Meeting: Parks and Nature Oversight Committee  
 Date/time: March 3, 2022, 4:00 – 5:30 p.m.  
 Place: Virtual meeting (Zoom)  
 Purpose: Report back from small group sessions in last meeting, review possible workplan for 2022 committee work.  
 Outcome(s): Solidify key takeaways for year one report; build agreement on workplan for 2022.

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**Committee Members:**

Tana Colbertson  
 Burt Edwards  
 Lisa Freedman  
 Georgena Moran  
 John Ferguson  
 Martita Meier  
 PK Melethil  
 Cary Watters  
 Vivek Shandas

Shannon Leary, Metro  
 Mychal Tetteh, Metro  
 Humberto Marquez-Mendez -  
 Allison Brown, JLA  
 Ariella Frishberg, JLA

Connor Ayers?

**Absent**

*Erin Upton*  
*Bryan Mercier*  
*Michelle Lin*  
*Nicole Johnson*  
*Eric Peterson*  
*Owen Wozniak*  
*Shantae Johnson*  
*Michael Morrow*  
*Shannon Shoul*  
*Tabitha Palmer DuPrau*

**Council Representatives:**

Councilor Shirley Craddick, District 1  
 Councilor Gerrit Rosenthal, District 5  
 Councilor Mary Nolan, District 3

**Staff:**

Beth Cohen, Metro  
 Melanie Reinert, Metro  
 MG Devereux, Metro  
 Melissa Weber, Metro  
 Dan Moeller, Metro

There were also three attendees, including members of the public and Metro staff, in the Zoom meeting.

**Topics*****Welcome and Agenda Review***

Allison Brown, JLA Public Involvement, began the meeting by welcoming everyone and reviewing Zoom tools and logistics, then took roll. A full record of the chat can be found in Appendix A.

Metro Councilor Rosenthal gave some welcoming remarks. Allison briefly introduced the staff present at the meeting and reviewed the agenda.

***Committee Business and Updates***

MG Devereux, Metro, thanked the group for their year-long efforts and invited members to provide feedback on the process. He provided additional committee updates:

- Council approved one- and two-year committee assignments.
- The process for appointing Lisa and Burt as committee co-chairs is in motion.

**Public Comment**

Allison called on members of the public to share their comments.

- Daniel Stuart, secretary and board member of the Northwest Trail Alliance, but giving testimony as a community member. I would like to bring to the committee's attention potential opportunities in leveraging the way the 2019 bond money is managed. After talking with staff, it sounds like the money is siloed into distinct program areas and that decreases the bond's ability to maximize success. Based on bond language, funds fall into one of six program areas. Within the Protect and Restore program, area refinement plans are being developed for acquisition targets. This approach may work well within the PRL program area, for example, but ignore opportunities to leverage funds from other areas to achieve the overall goals of the measure. The Multnomah Channel Headwaters under the Protect and Restore program is an example of this and passes through the conceptual Pacific Greenway Trail. This trail hasn't been funded yet, but funds could be achieved through both the Protect and Restore program and the Bike and Walk program. If Metro doesn't look across program areas to see how goals in different program areas might intersect and leverage each other, those opportunities might be lost. The Pacific Greenway Trail is conceptual and runs from Forest Park to the coast and the Multnomah Channel Headwaters area includes approximately five miles of Pacific Greenway Trail or 13% of its total length. The headwaters offer excellent opportunities to protect fish and wildlife habitat, protect future areas for the development of this trail, and provide access to nature via the existing trail system developed by the NW Trail Alliance in partnership with the existing landowner. The current landowner of this area is actively trying to sell this property. If an entity like Metro doesn't move to protect it, a significant chunk will be sold off to people looking to establish 160-acre hobby farms. This is based on the zoning and various land details. I encourage Metro and the committee to consider leveraging funds from different program areas to support important properties like the Multnomah County Headwaters to meet goals and objectives across programs.
- Dr. Eric Fruits, Research Director at Cascade Policy Institute. Cascade is a non-partisan 501c3 non-profit research and education organization. We do not solicit or accept funding from government or public agency. In 2019, Cascade published a comprehensive study on Metro's Parks and Nature Program and many of the problems we reported on then continue today. In the voters' pamphlet for the 2019 bond measure, Metro promised that the oversight committee – and that's you – would review bond expenditures and provide annual reports. So, your job is to advise and provide recommendations to Metro Council. Now Metro's staff may want you to focus on cheering the successes, but where you really add value is shining a light on possible failures and areas for improvement. You add value by telling voters and taxpayers where their money is going and how it's being spent. When we did our study three years ago, Metro promised new parks in the North Tualatin Mountains, north of Forest Park, at East Council Creek in Cornelius, on Gabbert Butte in Gresham and apparently all these projects have stalled. Metro says "promises made, promises kept." So, what is Metro doing to keep those promises? Why is Metro banking land outside of the Urban Growth Boundary, land that provides no direct benefit to Metro voters, residents and taxpayers? For example, Metro is sitting on 1,800 acres of land near the Sandy River that is off limits to the public and does not show up on any publicly available maps. Why is Metro buying land that is zoned for residential, commercial and industrial uses? How does locking up this land from productive use benefit Metro voters, residents and taxpayers? You need to push hard on the admin costs – they have skyrocketed over the past three years. Despite what Metro staff tell you, these admin costs are not part of the normal cycle of spending. It didn't happen with the 2006 bond, which you can see in the chart I provided in my previous written testimony. Also, you need to ask what Metro is doing with the so-called "extra money" it gets in the Bond premiums. From the staff report you were

given in the last meeting, it looks like that money, which is a lot of money – 20% of the total – has been used as a slush fund that was not authorized by voters. Metro is not alone in treating oversight committees as just a formality to placate good government types and Metro is not alone in charging oversight committees as cheerleaders, but that doesn't mean it's ok. Look, you're smart, knowledgeable people with a wide range of expertise. I urge you to put it to good use and help Metro keep its promises to voters. So, please ask questions and keep asking those questions if you don't get adequate answers. Thank you.

Beth confirmed no additional written public testimonies were received, though Dr. Eric Fruits provided a written copy of his verbal testimony. Allison asked Metro staff to share any additional written comments or questions they've received with the committee.

MG confirmed that Metro has prepared some written responses to Dr. Fruits comments from the previous two meetings and has forwarded them to the committee. Staff are also reviewing the two comments submitted for additional responses or clarifications and will forward that to the committee as well.

### ***Small Group Report Out***

Allison introduced the next section, asking a representative from each small group to share out what was discussed during the breakout rooms at the previous meeting.

- Lisa gave the report out for the Land Acquisitions group. The group discussion included:
  - Staff clarification and background on farmland issues raised in public testimony by Dr. Fruits.
  - Methodology for identifying the 24 target areas in the bond measure.
  - How community engagement shaped the target areas and the intersection between these different groups.
  - Opportunities to analyze target areas for any future land acquisition to provide more access and benefits to BIPOC communities.
  - How the Land Acquisitions program works with other programs in the Bond and other jurisdictional partners to increase access and benefits to undeserved communities.
  - Tom suggested prioritizing land purchases that provide interconnections to habitat areas in places undergoing rapid development.
- Cary Watters and Martita Meier gave the report out for the COBID group. The group discussion included:
  - A deeper look at how the COBID can help workforce equity and a desire to see more ways to look at the data.
  - Forward-thinking community outreach to marginalized groups helps increase trust, creates a better relationship, and should include finances as much as access.
  - Consider adding a self-designation option for business type.
  - COBID is the Certification Office for Business Inclusion and Diversity. It's the state-wide certifying agency for minority-owned enterprises, women-owned enterprises and more.
  - Cary noted the City of Portland is coming before Council to propose significantly expanding certification beyond State and comparable Agency standards.
  - Bert noted the group also discussed ways to reduce barriers in contract and workforce equity.
- PK Melethil gave the report out for the Community Engagement group which focused on feedback for the Year-End Report summarized below.
- Overall feedback from all three working groups on the Year-End Report included:
  - Add executive summary.

- Use plain language/avoid jargon.
- More accessible for public (include links, appendix, references to other documents, etc.).
- Include list of acquired properties with a summary of how they meet the Bond criteria.
- Include a projected admin spend three to five years out allowing for a measurable year-over-year comparison.

***Discussion: Key Themes and Overlap***

Allison introduced group discussion prompts and noted high-level feedback themes mentioned by each group during the Small Group Breakout Report Out section.

Comment: There is intersection in the programs but would like to hear what the group has to say before providing feedback on specific intersections.

Comment: A document like this report and all the questions that the working group discussed can be included in an appendix. How transparent does Metro want to be in its decision-making process? This committee is finally beginning to understand how Metro works, so the public might have a hard time understanding a complex document like this.

**Intersections**

Allison introduced the next section and Beth thanked the working groups for their valuable input. The working group's role is to provide input on the report and to elevate comments or concerns to Metro Council in an executive summary report from the committee to Council. Staff will ensure the working group's notes are captured in that summary.

Beth reiterated staff's appreciation for the committee's feedback and then committed to providing more context and specific examples in staff reports including the Year-End Report and future quarterly reports. Staff also want to explore different ways to build more visual tools to make report information more accessible to the public.

Beth also acknowledged that more time is needed to address racial equity and how it is prioritized across all the bond programs and not just siloed into community engagement or contracting. Staff have heard the committee ask, "What has been done, what are the examples of that work that has been done, and what are current and future tools to evaluate progress in advancing racial equity?" These questions stand out as key recommendations for staff to integrate into future work group discussions.

Comment: When we're talking about examples or tools to evaluate progress in advancing racial equity, I feel like that is crucially important. Would like to add that people that are differently abled are usually neglected or told what might be most beneficial rather than learning how to gather information about what they need specifically to advance equity. We need to look at this through a different lens for people with disabilities starting from the definition of disability as being "less than," instead of a person with a disability as approaching life in a different way and needing different resources to achieve the same end.

Comment: Didn't see the impact of the COVID-19 pandemic to the first year of the Bond included in the report, specifically in administrative, land acquisition or community engagement programs.

Comment: The most important way to achieve developing tools to evaluate progress in advancing racial equity is taking a discovery approach by collecting information to figure out what people want and collecting feedback through the development process to make sure the result is effective and beneficial.

We need new tools to understand the data while making sure there is a hands-on approach to talking to people and finding other ways to engage different communities. There are different reasons why something might seem workable in theory, but when we talk about systemic racism, the people benefit the most from that structure notice the problems the least. Other communities must accommodate that structure and might have to work three times as hard to get from point A to point B. So, if we come at this from an automatic assumption that we know how to do this and then we check in at the end, we're going to miss the point of the bond. There are groups and businesses that do this kind of information collection work. It would be worth extending the life of the bond if we took additional time to make sure we did it right.

Allison asked the group if the intersections outlined by Metro staff are in alignment with the committee's goals.

Comment: A committee member shared that they felt like they could participate in any of the three working groups but didn't want to lose sight that the other intersection goals need to be inclusive. For example, financial discussions need to use a racial equity lens, land acquisition needs to examine areas without parks and make sure that resources are well spent in that way.

Question: Does Metro have a rough number on what it takes to administer these bonds, specifically the \$470M Bond? How much of Metro's overall operating costs are allocated to overhead? Any additional information is helpful because any contextual information is relevant.

MG: The goal answer for Metro is 10%, which is where we came in the 2006 bond and I believe the 1996 bond – Melissa can confirm that since it was before my time at Metro. The pandemic and the nature of this bond have highlighted the need to do work differently, and that is one reason why the current administrative rate is much higher than we want over the life of the bond. That rate reflects how we've had to change the way we work during a pandemic. It's been very challenging for Humberto and the other folks that have been developing our community outreach strategies to think about how we gather people together. I love the idea of knocking on people's doors, but that wasn't feasible for us to do during the pandemic. Part of the push-pull of where we've been with the bond is wanting to move and make progress because the voters were very clear in the directionality of where this Bond should go. We're wrestling with big questions of "What does community engagement look like in a pandemic or how has the understanding of measuring racial equity not as a secondary or ancillary element, but as a key element of how we make decisions?" We appreciate your questions on this because it helps highlight where we need to do some additional work. The reason why we wanted to go slow at the beginning of this committee process, which was frustrating for some, was to make sure we had time to understand the foundational pieces of how this bond comes together and the complex language used in the bond.

Beth: Yes, the current administrative costs are \$4.17M, which is 23% over bond spending to date. The caveat is that in April 2020, we issued 200 million out of the total \$475M, so the current rate is from the initial bond issuance. This information is included in the staff report and another good reference for this is in response to the written testimony. Metro staff are available to answer any follow up questions outside of the committee meeting.

Comment: A committee member agreed the intersections capture the committee's comments and thought the intersections are a great start. The member suggested adding "accessibility for differently abled people" to "...evaluated the progress of advancing racial equity and accessibility for differently abled people across bond programs..."



Councilor Rosenthal commented that equity includes more than just racial equity like low-income, single parent families, different abilities, etc. He agreed that accessibility is a key component in addition to COVID concerns. For example, environmental cleanup and water quality improvements tends to happen in places with limited accessibility. He also commented that “community” is not a monolith and it’s important to use less bureaucratic and more understandable terms with the public. He also added that the comments from the Cascade Policy Group are worth exploring.

***Discussion: 2022 Work Plan Discussion***

Allison introduced the next section. Beth provided an overview the Staff Report timeline and introduced possible discussion topics including the committee’s oversight role, bond implementation work in 2022, or potential topics for the committee to focus on for the year. MG introduces possible oversight activities and proposed topics for the group to consider. Allison asked the group for their feedback on proposed ideas.

Comment: A committee member would like to focus on oversight in acquisition and financial goals.

MG clarified that Staff would like to know about information needs or topics that the committee might want to explore, however staff do not expect these answers right now. Staff will continue to bring the committee more information about community engagement and financial updates, but also want to make sure they’re bringing information that the committee wants to see for better transparency.

Question: How much are Metro staff interested in substantive feedback specifically about aligning the expenditures to the goals of the program? Is the committee seen as a body that can direct the bond?

MG: Yes, that’s one of the reasons why we pulled together a large committee with a wide variety of perspectives and lived experiences. What we’ve heard from one-on-one meetings is the question of “where is the line between oversight responsibility by providing staff and Council feedback on how the work is progressing and then more forward-looking considerations for staff to consider how they can adapt the bond moving forward or other efforts that intersects between the bond categories and other work that Metro is doing?” The committee has a direct voice with Council, so there is some push-pull.

Comment: A committee member comments that they would like to see some metrics about minority or small businesses participating in the activities.

Comment: Important that the committee get tours of the Metro sites going soon; there is only so much you can learn from looking at a map and reading a description.

MG: That is something we are considering. Metro is coordinating with OHA on safety guidelines and we’re figuring out where folks feel comfortable and how we can best organize that.

Comment: Even one person visiting a site and reporting back to the committee or bringing people along virtually could help.

Question: Is the report from staff to Council happening in April?

Beth: Yes, the report in April will be directly from the committee with the co-chairs representing the committee to Council. The report will be made available to the public and will encapsulate the committee’s themes and topics to council. The final staff report will include the edits and comments received at this meeting.

***Next Steps and Closing***

Allison and Beth shared the following items:

- Committee members can continue to email or contact Metro staff with their thoughts or feedback on the report. Staff will continue to refine the staff report and then draft up a report that is from oversight committee to Council based on received feedback. The committee can expect this draft in two weeks. Staff also offered review over email and a virtual drop-in session to review the draft with staff.
- Follow up survey on 2022 workplan
- Reminder to put holds on calendars for the meetings for the rest of the year (May, September, December)

MG informed the group about an upcoming in-person celebration for Mill Creek Canyon and hopefully one for Chehalem Ridge in the spring. The committee will be invited and hopefully they will get to meet in-person!

Allison thanked members for attending and the meeting was adjourned.

**Appendix A: Zoom Chat**

Georgena Moran: I will be off camera for now.

Melanie Reinert: Hi members- you should have received a copy of the comments earlier today as well as the response. If you did not, please let me know

Melanie Reinert: Sorry- I have a very slow response on my keyboard.

John Ferguson: Is the acronym COBID? What does it stand for?

Georgena Moran: Access for All, LLC is about consultation, training and advocating for people of all abilities. It is WBE, ESB & DBE certified. 50% African-American owned, 100% women owned.

Dan Moeller: COBID = Certification Office for Business Inclusion and Diversity

Beth Cohen: no pressure!

Melanie Reinert: coming soon!

Recording: <https://vimeo.com/684750150/f1956a3edc>



Metro

# Natural Areas and Capital Program Performance Oversight Committee

March 3, 2022

# Committee members



Metro

Tana Atchley Culbertson  
Burt Edwards  
Lisa Freedman  
Bryan Mercier  
Georgena Moran  
Cary Watters  
Owen Wozniak  
John Ferguson  
Shantae Johnson  
Michelle Lin  
Martita Meier  
PK Melethil  
Tabitha Palmer DuPrau  
Vivek Shandas  
Shannon Shoul  
Erin Upton

Co-Director, Nesika Wilamut  
Communications Director, Friends of Columbia Gorge  
Former US Forest Service Executive and Budgeting Director  
NW Regional Director, Bureau of Indian Affairs  
Accessibility specialist, ACCESS recreation  
Contract equity manager, Portland Bureau of Transportation  
Land Transactions Program Manager, the Land Trust Alliance  
Former geotechnical engineer  
Owner, Mudbone Grown LLC  
Adventure leader, Wild Diversity  
Digital Strategist and Project manager  
Environmental Scientist, private practitioner  
Underwriting Counsel, Fidelity National Title Group  
Professor, Portland State University  
Director, Procurement Sustainability, Nike  
Environmental social scientist and landscape architect

# Council liaisons



Metro

**Councilor Shirley Craddick, District 1:** includes Fairview, Gresham, Troutdale, Wood Village, portions of East Portland and the unincorporated communities of Damascus and Boring

**Councilor Mary Nolan, District 5:** includes Northwest and North Portland, portions of Southwest and Northeast Portland, plus the city of Maywood Park and part of Washington County.

**Councilor Gerritt Rosenthal, District 3:** includes portions of Washington and Clackamas counties and the cities of Beaverton, Durham, King City, Sherwood, Tigard, Tualatin and Wilsonville

# Staff team



Metro

*Parks and Nature leadership:* Jon Blasher, MG Devereux, Dan Moeller, Mychal Tetteh

*Background information, staff support:* Beth Cohen

*Meeting logistics, administrative support:* Melanie Reinert

*Facilitation:* Allison Brown

*Office of Metro Attorney:* Michelle Bellia

*Parks and Nature finance manager:* Melissa Weber

# Today's agenda



Metro

- 4:00 p.m. Welcome
- 4:15 p.m. Committee business
- 4:20 p.m. Public Comment
- 4:30 p.m. Small Group Report Out
- 4:45 p.m. Discussion: Key themes and overlap
- 5:00 p.m. Discussion: Work plan for 2022
- 5:25 p.m. Next steps
- 5:30 p.m. Adjourn



# Group agreements



Metro

- In discussions, challenge ideas rather than individuals.
- Approach different opinions with curiosity, seek to understand.
- Keep the needs and concerns of the local community and the larger region at the forefront of the work.
- Keep focus on the objectives of the meetings; work with facilitator to note additional topics for discussion.
- Keep multi-tasking to a minimum

# Group agreements



Metro

- Notify committee chairperson and Metro staff of any media inquiries and refer requests for official statements or viewpoints to Metro. Committee members will not speak to media on behalf of the committee or Metro, but rather only on their own behalf.
- Share questions they have with the full committee so everyone can benefit from the answers
- Members in working groups commit to capturing discussions to transparently share the results with the larger group.

# Committee business reminders



Member re-appointments for 2022

Reminders to reply only to  
[parksandnaturebond@oregonmetro.gov](mailto:parksandnaturebond@oregonmetro.gov)  
on committee business

Other member updates to share?

# Public comment



Metro

Three minutes per speaker

Can always submit written testimony to  
[parksandnaturebond@Oregonmetro.gov](mailto:parksandnaturebond@Oregonmetro.gov)

# Working groups report out



Metro

Land acquisition, community engagement, bond finance/contracting

1. Topics/questions discussed
2. Feedback for year one report
3. Topics for future discussion

# Group discussion



Metro

Do you see any overlaps in working group discussion?  
What are opportunities there?

What do you want to raise for consideration for the  
year one report back to Council? Anything this group  
should be monitoring for 2022?

Key feedback you want to be in your committee memo  
to Council

# Intersections



Metro

- Information provided in staff report and in response to testimony is helpful and committee would like more information
- Explore different ways to provide more accessible summaries of this information for the public, using an executive summary
- Need more examples of and tools to evaluate the progress of advancing racial equity across bond programs and beyond engagement and contracting; how we “know”
- Other?

# Year 1 report—next steps



Metro

Staff compiles notes/recommendations from today's discussion into a summary

Updates staff report

Share with committee via email with a deadline to respond

Hold drop in time for members to discuss with staff if needed

Finalize by early April 2022



# 2022 work plan discussion



Metro

Staff provide context on

- Committee's role
- Upcoming bond implementation work for 2022
- Potential topics for the committee to lean into this year

Group discussion to provide guidance to staff to begin to set agenda for upcoming meetings for May, September and December

As the work and committee discussions evolve, committee focus and meeting time can adjust as needed

# Oversight activities



Review whether the six programs described in the 2019 Parks and Nature Bond are meeting the goals and objectives established for the program by the Metro Council.

<b>Oversight activities</b>	<b>Tools available</b>
<u>Monitor</u> staff's efforts to implement the bond and make programmatic investments	Quarterly reporting from staff on bond program work, bond investments made and community engagement activities  Working groups
<u>Evaluate</u> outcomes of bond activities and investments over the life of the bond	Bond evaluation outcomes project data collection pilot  Refining existing dashboards that display staff work to date

# Oversight activities



Metro

Monitor financial aspects of program administration, including review of program expenditures; Review capital expenditures related to the 2016 Parks and Natural Areas Local-Option Levy and the 2006 Natural Areas Bond Measure.

<b>Oversight activities</b>	<b>Tools available</b>
<u>Monitor</u> bond spend, administrative costs from 2019, 2006 and levy funded capital investments	Regular reporting from staff on bond finance including summaries  Projections of bond spend in future years (2-3)  Working group on bond finance?

# Proposed topics to focus on in 2022



Metro

## *Collaborate with staff on*

- Reporting tools for Metro's land acquisition work
- Initial phase of data collection and interpretation for bond evaluation outcomes project
- Year two report

## *Review staff work on*

- Process for capital grants pilot when initiated
- Local share program progress
- Progress of land acquisition work

## *Continue to receive regular updates on*

- bond finance reporting and bond spend across programs
- COBID utilization rates (quarterly reporting)
- bond spend on capital projects (quarterly reporting)

## *Participate in other optional events and activities to be scheduled*

- Tours of Metro sites/projects

# Bond evaluation outcomes



Metro

**What is it:** Project to develop a framework to monitor and measure effort and impacts of bond investments over the life of the bond.

## **Key staff activities in 2022:**

- Work with Metro Council to finalize a framework of the outcomes the bond is working to address
- Launch a pilot to identify data to collect by late summer 2022

### Potential 2022 Oversight committee role(s)

Review/advise on initial indicator selection and data collection pilot (spring 2022)

Sense-making of findings from initial data collection (fall 2022)

Evaluation of data piloting; identify lessons learned (winter 2022)

Advise on ways to communicate data and lessons learned to public (ongoing)

# Land acquisition



Metro

## Key staff activities in 2022:

- Purchase land in priority habitats across the region through willing seller program
- Continue to receive feedback from tribal governments on refinement plans

### Potential 2022 Oversight committee role

Review purchases upon completion (ongoing)

review program progress in meeting Council direction each year (ongoing)

raises questions, concerns for staff and Council (ongoing)

Help staff shape reporting tools to measure progress on and analysis of land acquisition (spring 2022 and beyond)

# What you can expect



Month	Proposed topics
May 2022 Meeting	Receive update on bond evaluation outcomes project;  Provide feedback on indicators to prioritize and data collection to pilot  Reporting tools for Metro's land acquisition work  Other?
September 2022 Meeting	Review initial data collected in pilot  Other?
December 2022 Meeting	Prepare plan for year one report

\*April, July, October 2022: committee receives quarterly reporting via email

# 2022 work plan discussion



Metro

What are your thoughts about the proposed topics for 2022?

Do the proposed meeting topics address the issues raised for the year 1 report?

Should we continue working group conversations? If so, should the working groups evolve?



# Wrap up and next steps



Metro

Share draft report back with committee for review

Follow up survey on 2022 work plan as needed

Calendar holds for May, September, December meetings

**oregonmetro.gov**



**Note: The following document with notes represents one committee member's feedback shared during the meeting, but does not represent the entirety of the committee's feedback on the staff report.**



# Staff report on bond work in calendar year 2021

For the Natural Areas and Capital Program  
Performance Oversight Committee

February 2022

If you picnic at Blue Lake or take your kids to the Oregon Zoo, enjoy symphonies at the Schnitz or auto shows at the convention center, put out your trash or drive your car – we’ve already crossed paths.

**So, hello. We’re Metro – nice to meet you.**

In a metropolitan area as big as Portland, we can do a lot of things better together. Join us to help the region prepare for a happy, healthy future.

**Stay in touch with news, stories and things to do.**

[oregonmetro.gov/news](http://oregonmetro.gov/news)

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**Metro Council President**

Lynn Peterson

**Metro Councilors**

Shirley Craddick, District 1

Christine Lewis, District 2

Gerritt Rosenthal, District 3

Juan Carlos González, District 4

Mary Nolan, District 5

Duncan Hwang, District 6

**Auditor**

Brian Evans

600 NE Grand Ave.

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## TABLE OF CONTENTS

Purpose .....	1
Background on Metro parks and nature voter approved investments .....	1
Addressing the bond criteria .....	2
Bond refinement program updates .....	4
Protect and restore land .....	5
Local share .....	6
Nature in neighborhoods capital grants .....	7
Walking and biking trails.....	8
Take care of Metro parks.....	9
Large-scale community visions .....	10
Bond financial reporting .....	10
Appendix .....	14
Bond measure program criteria.....	14
Community engagement and racial equity criteria .....	14
Climate Resilience Criteria .....	14
Glossary.....	15
Bond refinement community engagement summary, February 2022 .....	16
2019 bond spending detail as of December 31, 2021 by program area .....	21
2006 bond spending detail as of December 31 2021 by program area .....	22

DRAFT

**Date:** February 2022

**To:** Natural Areas and Capital Program Performance Oversight Committee

**Re:** Staff report on bond work in calendar year 2021

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## **PURPOSE**

The Natural Areas and Capital Program Performance Oversight Committee provides independent oversight of the 2019 parks and nature bond, the remainder of the 2006 natural areas bond and capital investments from Metro's parks and nature five-year local option levy.

As part of this charge, the Metro Council has asked the Oversight Committee to monitor how bond implementation activities are meeting the direction in the bond measure, to monitor financial aspects of program administration and to share with the Metro Council related concerns or recommendations to help adjust work moving forward. This report is intended to summarize information for the committee's review by providing:

1. Summaries of how bond activities in the last year are addressing the three bond criteria
2. Status updates on each of the six bond program areas
3. Reporting on bond spending and other bond financial data

## **BACKGROUND ON METRO PARKS AND NATURE VOTER APPROVED INVESTMENTS**

For more than two decades, voters have repeatedly trusted Metro to protect clean water, restore fish and wildlife habitat and provide opportunities for people to connect with nature close to home through the passage of three capital bond measures and two local option levies.

The voter approved bond measures and levies are linked together to make the region's system of parks, trails and natural areas possible. The three capital bond measures (1995, 2006 and 2019) have supported the acquisition of more than 15,000 acres of priority habitat, investments in parks, trails and natural areas around the region. Metro's parks and nature local-option levy supports restoration of fish and wildlife habitat on lands purchased with the bond measure, and invests in park operations and improvements and community education, programming and grants to projects designed by community that strengthen people's connection to nature close to home.



## 1. ADDRESSING THE BOND CRITERIA

The Metro Council included three overarching criteria to govern 2019 parks and nature bond programs: racial equity, climate resilience and community engagement. Each of the six bond program areas will advance these bond criteria in different ways by providing direction to community grant or local share recipients or applying this policy direction to Metro's investments at its facilities and sites across the region. The Natural Areas Oversight Committee provides independent review of whether and how the bond activities are meeting the direction from the Metro Council and endorsed by voters of the region.

The following is a summary of efforts in the last calendar year to advance the three bond criteria through program development, tool building and fostering shared understanding. As bond investments continue, the committee's evaluation of how bond programs are meeting these criteria will continue to evolve.



*Build resources and tools to understand how to advance climate resilience through bond investments made by Metro, grant recipients and the region's local park providers*

- This bond measure builds on the legacy of 25-plus years of protecting the region's special places through land acquisition and restoration. Land acquisition is at the heart of Metro's parks and nature department work and has allowed for purchasing land to protect the region's priority habitats and species as outlined in the Oregon Conservation Strategy and Regional Conservation Strategy including riparian, floodplain, wetlands, oak woodland and forest, oak savanna and prairie and upland forest.
- Advanced an [understanding of concepts underlying climate resilience](#) for Metro staff, local park providers and other grant recipients by providing additional resources on considerations and definitions.
- As part of the refinement of land acquisition priorities, **conducted an initial analysis that provides additional context on environmental burdens, access to natural areas and where potential land purchases may have greater opportunity to prevent flooding to complement the data from the ecological assessments.** Staff will continue to refine this analysis and identify additional uses for it across Parks and Nature's portfolio.




*Ensure that bond programs are considering and addressing racial disparities in benefits from our parks, trails and natural areas*

- Set a 20 % minimum for utilization of minority-owned, women-owned and emerging small business owners registered with Oregon's Certification Office for Business Inclusion and Diversity (COBID) for bond contracting, with plans to set and meet higher goals for COBID utilization through the life of the bond.
- Set a 20 % minimum for utilization of minority-owned, women-owned and emerging small business owners registered with Oregon's Certification Office for Business


Inclusion and Diversity (COBID) for bond contracting, with plans to set and meet higher goals for COBID utilization through the life of the bond.

- Incorporated the requirements of [Metro's Construction Career Pathways framework](#) to increase the opportunities for access to the trades for women and people of color in greater Portland on bond funded projects at Metro facilities. The request for proposals for the upcoming bond funded improvement projects at Blue Lake Regional Park is the first to use Metro's Construction Careers Pathways Project framework to set specific diversity goals alongside its construction requirements for contractors.
- Supported local park providers to implement goals and tracking around COBID utilization and workforce diversity for bond funded investments. 
- Conducted [an initial analysis](#) of anti-displacement impacts and mitigation strategies related to trails and natural area investments and sharing those considerations with Metro staff and the region's park providers.
- Hosting [roundtables](#) for the region's park providers to share lessons learned about topics such as anti-displacement, contracting with COBID certified firms and workforce diversity. 

*Carry out meaningful community engagement that centers the needs and builds trust with BIPOC and other marginalized community members*

- Implement a [community engagement framework](#) that centers the voices of Black, Indigenous and other people of color (BIPOC), LGBTQ+ community members, immigrants and refugees, people with low incomes, people with disabilities, and other marginalized communities. 
- Goals for community engagement during the last year of bond refinement activities [included](#) 
- Center BIPOC communities in development of bond programs and prioritization of bond investments
- [Increase transparency and access about bond decision-making](#) 
- [Shift decision-making to community members where possible](#)
- Utilized a broad set of engagement strategies and tactics to achieve these goals, which are summarized in the appendix reporting on those tactics.

*Develop bond evaluation framework*

The voters of the region have asked us to do our work differently with this bond and that means listening and learning about the needs and priorities of communities who haven't benefitted equitably from previous investments. This also means we need to [identify new ways to understand whether and how we are fulfilling this promise](#). Metro's parks and nature department has experience in collecting a robust set of data to quantify our work funded by voter approved measures and the [values of this bond require us to think differently about measuring our impact](#). 

Metro staff have launched a process with a consultant, Dialogues in Action, to develop a framework to monitor efforts towards meeting the three bond criteria and measuring the impact of bond investments through the life of the bond. Staff anticipates bringing an update on the status of this work for the committee's review in spring 2022 and expects that the oversight committee will want to help shape the analysis of data as part of its work in 2022 and beyond.

## 2. BOND REFINEMENT PROGRAM UPDATES

Bond refinement, the process to turn the bond measure language into six functional programs, will be nearly complete by spring 2022. The following summary provides updates on the status of each program area. More detail about the specific engagement activities for the development of each program area can be found in the community engagement summary in the appendix.

DRAFT






## PROTECT AND RESTORE LAND

**\$155 million** allocated for acquisition and restoration of priority habitat across 24 target areas, <https://www.oregonmetro.gov/protect-and-restore-land>



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**Program description:** Protect and restore land builds on the successes of the 1995 and 2006 natural areas bond measures in protecting greater Portland's special places, by purchasing land and restoring it in 24 target areas across the region. Land protection and restoration in all 24 target areas helps restore and preserve regional watersheds, protect some of the region's rarest habitats, protect culturally important plants and create future potential access to nature.

### Key bond refinement activities completed in 2021:

- Completed ecological assessments of the 24 target areas outlined in the bond measure with ongoing input from the urban Indigenous community 
- Engagement to help confirm priorities and compile local knowledge for each of the 24 target areas with conservation partners, park providers and community members 
- Develop draft refinement plans that articulate a road map for acquisition for each of the 24 target areas based on information collected and engagement findings 
- Creating space for tribal governments to provide input on the priorities in refinement plans currently and post-Council approval in spring 2022 
- In spring 2022, Council's consideration and approval of refinement plans for each of the 24 target areas will give staff direction to purchase land through our willing seller program. 

### Key implementation activities in 2022:

- Finalize refinement plans that articulate a road map for acquisition for each of the 24 target areas based on information collected and engagement findings 
- Purchase land in priority habitats across the region through willing seller program
- Continue to receive feedback from tribal governments on refinement plans 





## LOCAL SHARE

\$92 million allocated to local governments for park improvement projects and locally important acquisitions, [www.oregonmetro.gov/localshare](http://www.oregonmetro.gov/localshare)

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**Program description:** The local share program distributes \$92 million to 27 park providers (23 cities, 2 counties and 2 park districts) across the metro area to invest in their community's parks and nature projects including land acquisition, habitat restoration and connectivity, park access facilities at public parks and natural areas, local and regional trails and interpretive or environmental education facilities.

### Key bond refinement activities completed in 2021:

- Developed a local share program handbook and supporting materials that provides guidance to park providers as they identify and submit priority projects 
- Metro Council approval of an Intergovernmental Agreement template to govern individual agreements with park providers once they have submitted projects 
- Convened the region's 27 park providers in monthly roundtables to share lessons learned around addressing the bond criteria including community engagement and anti-displacement 
- Approved local share funds for a land acquisition in Gresham at the Shaull property 


### Key implementation activities in 2022:

- Review park providers' project submissions and finalizing agreements to disburse bond funds
- Convene the region's 27 park providers to share lessons learned around meeting the bond criteria including tribal government engagement



## NATURE IN NEIGHBORHOODS CAPITAL GRANTS

**\$40 million** to community groups, non-profits and local governments for projects that “re-green” or “re-nature” neighborhoods, <https://www.oregonmetro.gov/tools-partners/grants-and-resources/nature-grants>


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**Program description:** The Nature in Neighborhoods capital grants program provides up to \$40 million for grants supporting community-led projects that protect and improve water quality and fish and wildlife habitat, support climate resilience and increase people’s experience of nature at the community scale. This program also includes the Nature in Neighborhoods Capital Grants Pilot, which will use a **community-centered process to create meaningful opportunities to shape \$4 million for investments selected by the community.** 

### **Key bond refinement activities completed in 2021:**

- Designed framework for capital grants pilot in partnership with **Participatory Budgeting Oregon** 
- **Recruited and convened a community committee** to help design the program and ultimately recommend up to \$4 million in grant funding that began meeting in January 2022 

### **Key implementation activities in 2022:**

- Launch and support community committee to help design the solicitation for up to \$4 million in grant funding
- Work with community committee to **develop a guidebook** to launch the solicitation of project ideas in summer 2022.
-  • Begin to **develop the guidebook** for the Nature in Neighborhoods grant program to launch in 2023

## WALKING AND BIKING TRAILS

**\$40 million** for building out the regional trails network, [oregonmetro.gov/regional-trails-and-greenways-system](https://oregonmetro.gov/regional-trails-and-greenways-system)

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**Program description:** This program provides \$40 million to plan and build out trails that close gaps in the regional trails system via \$10 million for acquisition from willing sellers and roughly \$20 million for competitive grants to local governments to plan, design and build regional trails.

### **Key bond refinement activities completed in 2021:**

- Compiled local knowledge and priorities about priorities for 39 regional trails listed in the bond measure from park providers, trail advocates and community members
- Implemented a community engagement strategy that centered BIPOC and other marginalized communities
- Developed a tool to prioritize gaps in the regional trail network for acquisition and used feedback from partners and community to influence which factors are emphasized in the trail prioritization tool
- Develop a draft refinement plan that articulates a road map for trail acquisition priorities across 39 regional trails for Council approval in spring 2022
- Developed solicitation for local government grants to plan and build regional trails in fall 2021

### **Key implementation activities in 2022:**

- Finalize a refinement plan that articulates a road map for trail acquisition priorities across 39 regional trails for Council approval in spring 2022
- Purchase land through the willing seller program where Metro and partners will one day build regional trails
- Solicit and review applications from local jurisdictions for trail grants, with grant awards expected to be made by the Metro Council in fall 2022.

## TAKE CARE OF METRO PARKS

**\$98 million** for safety and accessibility improvements at Metro parks and facilities across the region

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**Program description:** Metro's regional parks, boat launches and cemeteries areas welcome nearly 2.5 million visitors a year to enjoy nature, exercise and cultural gatherings. The take care of Metro parks program funding is a promise to take care of Metro's existing sites by addressing capital maintenance, repair and improvement needs at Metro facilities and completing nature parks with adopted master plans.

### **Key bond refinement activities in 2021:**

- Opened two new nature parks: [Newell Creek Canyon](#) in Oregon City and [Chehalem Ridge](#) south of Forest Grove
- Worked to advance health and safety improvements at Metro's sites like [Blue Lake Regional Park](#) and addressed barriers to meet or exceed Americans with Disabilities Act barriers
- Dedicated \$4 million to Lone Fir Cemetery's cultural heritage and memorial garden, also known as Block 14, to honor Chinese immigrants and patients from the Oregon Hospital for the Insane

### **Key implementation activities in 2022:**

- Complete a municipal water supply connection to Blue Lake Park and plan for the next phase of maintenance facility and utility improvements. Begin community engagement for Blue Lake Park renovation planning and design.
- Installation of a generator at the Oxbow Welcome Center and completion of maintenance area improvements as part of the Phase 2 of the welcome center and initiate assessment of Oxbow's potable water system for repair.
- Continue to work with community to advance a vision and design for a cultural heritage garden at Lone Fir cemetery honoring Chinese immigrants and patients from the Oregon Hospital for the Insane
- Continue to plan and prioritize bond funded projects to improve access that meet or exceed ADA standards at Metro parks and facilities across the region



## LARGE-SCALE COMMUNITY VISIONS

**\$50 million** for green investments in regional transformative projects

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**Program description:** The Metro Council created the large scale community visions program to fund regionally significant catalytic investments that re-green communities and connect parks and nature with other community assets such as transportation and affordable housing. \$20 million is set aside for the Willamette Falls Legacy Project.

### **Key bond refinement activities completed in 2021:**

- Develop program criteria in alignment with what's already in the bond measure and additional considerations to ensure projects selected through this program match the policy direction set by the Metro Council

### **Key implementation activities in 2022**

- Work with the Metro Council to finalize more detailed program parameters and guidance by spring 2022.

## 3. BOND FINANCIAL REPORTING

The committee will regularly review financial reports for the limited remaining money from the 2006 natural areas bond, capital investments from the parks and nature levy, and the 2019 parks and nature bond. Financial data is tracked by Metro's fiscal year, which goes from July 1 through June 30.

Metro issued the first round of bonds on April 21 2020. So far, Metro has issued \$200 million in bonds for the start of this 10-year program and has been able to take advantage of historically low interest rates and earn a return while preparing to spend in the form of a bond premium.

As of December 2021, Metro has spent \$18.3 million of bond proceeds available. Here is how spending breaks down by program area. More details about bond spending by program area can be found in the appendix.

- Protect and restore land (including acquisitions): \$5.3 million
- Taking care of Metro parks: \$5.1 million
- Local share: \$2.9 million
- Capital grants: \$337k
- Walking and biking trails: \$374k
- Large-scale community visions: \$43k

The focus on bond refinement for six new program areas over the last year has meant that bond spending overall appears low. Additionally, there are many administrative costs Metro

has had to incur to shape the programs. With little capital investment spent to date, the current administrative rate appears quite high. The current administrative costs are \$4.17 million, representing 23 percent over the life of the bond.

As with other voter investments, administrative expenses tend to be highest in the first few years as new programs are being built. Once the programs are up and running, the administrative expenses decrease significantly, before a small uptick in the last few years of the life of the bond measure. We fully expect administrative expenses with the 2019 parks and nature bond measure to do the same. The 2006 natural areas bond measure's administrative cost was under 10 percent and we expect the 2019 parks and nature bond measure to be close to that over the life of this bond measure.

*Here are some of the specific projects and programs we've invested from 2020 to December 2021:*

- Acquisition to protect key parcels from the Sandy River Gorge on the east to the Dairy McKay Creeks on the west totaling \$2,699,500. Most recently, Metro acquired two properties totaling 169 acres. Out at Killin Wetlands Nature Park, near Banks in Washington County, 52 acres were added to the natural area surrounding the park. And in the East Buttes area right on the Clackamas-Multnomah county line, 117 acres connect to the Sunshine Butte Natural Area. The property includes a hilltop where several small streams begin their way down to Johnson Creek.
- Local share funds for Gresham's acquisition of the Shaull property: \$2.5 million.
- Chehalem Ridge Nature Park, \$5.3 million: Chehalem Ridge Nature Park is just south of Hillsboro and is Metro's biggest park west of the Willamette River. The park has 10 miles of trails for hiking, biking and horseback riding.
- Newell Creek Canyon Nature Park, \$2.9 million: Newell Creek Canyon Nature Park, which is in the heart of Oregon City also opened in 2021. Newell Creek Canyon has 2.5 miles of hiking and walking trails and 2 miles of dedicated mountain biking trails.
- Blue Lake Regional Park utilities and facilities improvements, \$337k: The money we've spent at Blue Lake is only the start of improvements and renovations at this beloved park. The work so far has focused on connecting the park's water system to the City of Fairview. In December 2021, staff put out a request for proposals on a contract to demolish and replace several buildings at the park, which will set us up for additional park improvements that community members will help identify.
- Oxbow Regional Park health and safety improvements, \$296k: The biggest project so far at Oxbow is the replacement of a sanitation system.

#### *COBID spending*

Metro tracks the percentage of bond spending with firms that are certified with Oregon's Certification Office for Business Inclusion and Diversity (COBID). In addition, Metro tracks

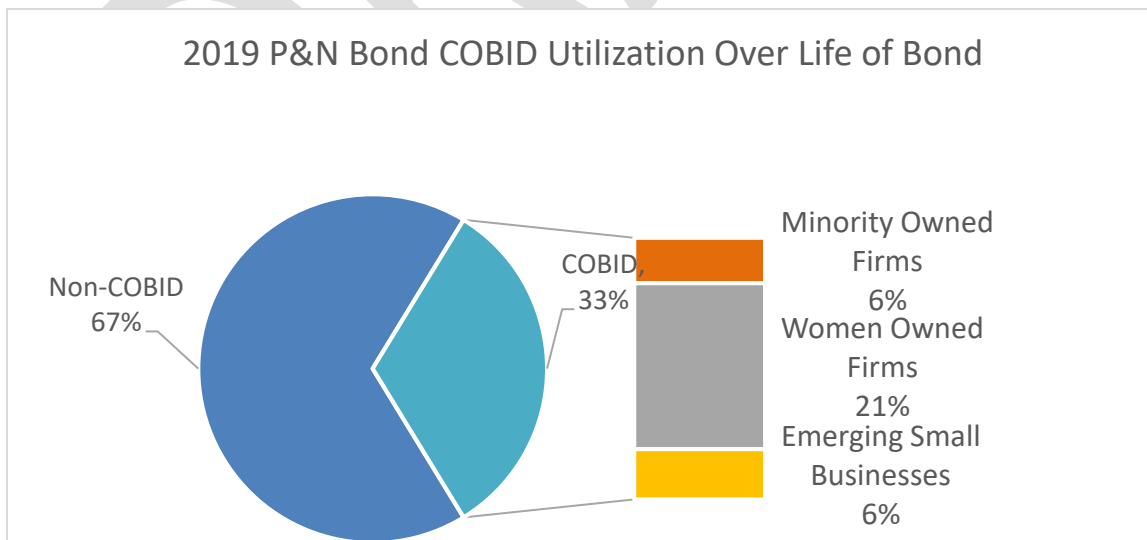
the spending percentage with each type of COBID certification minority owned, women owned and emerging small businesses, service-disabled veteran-owned).

Metro’s utilization reporting method removes work that cannot reasonably be performed by a COBID-certified firms from the utilization rate calculation. Metro excludes the following types of contracts and payments from the calculation:

- Services provided by another public agency that do not compete with the private sector
- Services for which there is a single or limited group of businesses, none of which are COBID-certified
- Services mandated by Oregon Law (Oregon Revised Statutes) to be provided by qualified rehabilitation facilities

*Parks and nature bond COBID utilization percentages from fiscal year 2019-20 to December 2021*

Fiscal Year	2006 bond	2019 bond
FY20	32%	1%
FY21	14%	29%
FY22 YTD	59%	46%



*2006 natural areas bond measure*

Metro sold the remaining 2006 bonds in spring 2018. Remaining funds from the 2006 bond measure are close to being spent or are dedicated to upcoming projects or acquisitions. Staff will continue to provide the 2006 Natural Areas bond spending report to the oversight committee until funds are completely spent. . The latest 2006 natural areas bond spending report can be found in the appendix.

*Local-option levy*

Metro's parks and nature local-option levy protects clean water, restores fish and wildlife habitat at natural areas across the region and connects people with nature across 17,000 acres of parks, trails and natural areas through investments in capital projects and programs. The Natural Areas Oversight Committee will review any capital investments supported by the levy. In the last calendar year, the levy did not fund any capital investments, but in future years, the committee can expect to review levy-funded capital projects at Metro's parks, trails and natural areas.

## APPENDIX

### BOND MEASURE PROGRAM CRITERIA

#### **Community engagement and racial equity criteria**

Investments in all program areas must satisfy all of the following community engagement and racial equity criteria:

- Meaningfully engage with communities of color, Indigenous communities, people with low incomes and other historically marginalized communities in planning, development and selection of projects.
- Prioritize projects and needs identified by communities of color, Indigenous communities, low-income and other historically marginalized groups.
- Demonstrate accountability for tracking outcomes and reporting impacts, particularly as they relate to communities of color, Indigenous communities, people with low incomes and other historically marginalized communities.
- Improve the accessibility and inclusiveness of developed parks.
- Include strategies to prevent or mitigate displacement and/or gentrification resulting from bond investments.
- Set aspirational goals for workforce diversity and use of COVID contractors and work to reduce barriers to achieving these goals; demonstrate accountability by tracking outcomes and reporting impacts.

#### **Climate Resilience Criteria**

All projects funded by the bond must identify at least one climate resilience criterion that the project will satisfy from among the following:

- Protect, connect and restore habitat to support strong populations of native plants, fish and wildlife that can adapt to a changing climate.
- Protect and restore floodplains, headwaters, streams and wetlands to increase their capacity to handle stormwater to protect vulnerable communities from flooding.
- Increase tree canopy in developed areas to reduce heat island effects.
- Use low-impact development practices and green infrastructure in project design and development.
- Invest in segments of the regional trail system to expand active transportation opportunities for commuting, recreation and other travel.

## GLOSSARY

**BIPOC:** Shorthand descriptor for Black, Indigenous, people of color

**COBID:** [Oregon's Certification Office for Business Inclusion and Diversity](#). The primary goal of certification is to level the playing field by providing certified firms a fair opportunity to compete for government contracts regardless of owner ethnicity, gender, disability or firm size.

**Construction Career Pathways:** Regional effort of public agencies teaming up with stakeholders from private industry, apprenticeship programs, unions and community-based organizations to provide reliable career pathways for women and Black, Indigenous, and people of color in the construction trades.

**Refinement plans:** Formal publically adopted road maps outlining strategies for land acquisition that reflect Council direction, community input and give Metro staff the guidance to protect habitat and land for future trails.

**Bond refinement:** The work to turn the 2019 parks and nature bond measure language into programs ready to invest in parks, trails and natural areas across the region.

## **BOND REFINEMENT COMMUNITY ENGAGEMENT SUMMARY, FEBRUARY 2022**

Does not include Metro Council or tribal government engagement

### **Introduction**

In November 2019, voters in greater Portland approved a \$475 million bond measure to further protect clean water, restore fish and wildlife habitat and provide opportunities for people to connect with nature close to home.

Much of the work to turn the parks and nature bond into programs ready to invest in our region's parks, trails and natural areas is on track to be complete by spring 2022. The investments from the 2019 bond measure will continue to strengthen our unique system with nature at its heart. The local share program is ready to make investments in parks, trails and natural areas in communities across the region, health and safety updates and renovation projects are underway at Blue Lake and Oxbow regional parks, and an application process is open for up to \$20 million in grants for local governments to plan and construct regional trails.

With this bond measure, the voters of the region asked us to do our work differently. That has meant listening and learning about the needs and priorities of communities who haven't benefitted equitably from previous investments. Over the last year, communities across the region have participated in meaningful engagement that staff have designed to meet the following core values:

- Center BIPOC communities in development of bond programs and prioritization of bond investments
- Increase transparency of and access to bond decision-making
- Increase access to engagement opportunities

The feedback collected in the last year from community members and partners has helped shape bond programs that protect clean water, restore fish and wildlife habitat and provide access to nature. In addition, the feedback captured will be instrumental in informing work across the parks and nature portfolio from community grants to restoration work.

### **Initial reflections from engagement planning and execution**

- Setting clear expectations about what participants can influence, and acknowledging feedback even if it's outside the scope of the topic at hand increases transparency and can build trust
- Capturing and reporting back on feedback heard by hosting follow up sessions with the same stakeholders can create stronger relationships with partners and increase interest in participation. Many community members participated in multiple engagement activities across bond programs from 2021-2022.

- Organizing focused events tailored to specific audiences can help build more meaningful and productive engagements

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## Engagement activities by program area through January 2022

Bond program	Goals for engagement during refinement	Engagement work complete to date	How engagement has shaped the bond programs and parks and nature
<p><b>Protect and restore land</b></p>	<p>Community and partner review of acquisition strategies for each of the 24 target areas before Metro Council approval</p> <p>Nurture authentic partnership with urban Indigenous community cohort throughout the refinement process</p> <p>Continue to work with conservation partners on information collection</p> <p>Include goals and priorities from BIPOC communities into refinement plans</p>	<ul style="list-style-type: none"> <li>• 100 community members and partners participated across three engagement sessions to review acquisition strategies in winter 2022</li> <li>• At least six meetings with urban Indigenous community on data and format for ecological assessments of 24 target areas</li> <li>• Hosted 6 affinity group roundtables for BIPOC and people with disabilities in fall 2021 (with over 100 participants) and 2 follow up sessions in winter 2022 (with 60 participants)</li> <li>• Interviews with 129 individuals representing 59 organizations including park providers and watershed councils</li> <li>• Two information sessions with over 70 participants in fall 2021</li> </ul>	<ul style="list-style-type: none"> <li>• Data collected to understand each of the 24 target areas in the bond measure expanded to include stream daylighting/inline pond removal, pollution/toxins/water quality data, among others</li> <li>• Acquisition strategies for the 24 target areas reflect information and local knowledge shared from partners and aligned with goals and priorities of BIPOC community members, especially around environmental factors such as floodwater mitigation</li> </ul>
<p><b>Local share</b></p>	<p>Ensure program materials reflect needs and concerns raised by park providers</p> <p>Support park providers in identifying project priorities that meet bond criteria</p>	<ul style="list-style-type: none"> <li>• Development of local share program materials</li> <li>• Hosted 6 roundtables for staff from region’s park providers</li> <li>• Bond updates at 7 quarterly park directors meetings</li> <li>• At least one meeting with each of the 27 park providers across the region around project priorities</li> </ul>	<ul style="list-style-type: none"> <li>• Local share projects submitted and more on the way</li> <li>• Lessons learned around strategies for meaningful community engagement help shape park providers local share project identification processes</li> <li>• Increased connections across park providers</li> </ul>

	Build spaces for collaboration between Metro and park providers		
<b>Walking and biking trails</b>	<p>Build relationships with BIPOC community members around needs and priorities for regional trails</p> <p>Ensure that up to \$20 million for grant program to plan and build regional trails has a solicitation process that reflects partner input</p>	<ul style="list-style-type: none"> <li>• Two focused community sessions with over 100 BIPOC community members to provide input on what factors are most important for trail projects and 88 participants responded to a follow up survey</li> <li>• Five open houses in fall 2021 with 100 participants across the sessions to share information and collect feedback about priorities for trail acquisition</li> <li>• 127 individuals responded to a survey to collect feedback on draft priorities for trail acquisition</li> <li>• Meetings with each 27 park providers and local jurisdictions about priorities for regional trails</li> <li>• Performance evaluation work group with park provider staff and community members to help shape solicitation for trail grants</li> </ul>	<ul style="list-style-type: none"> <li>• Tool to help prioritize trail gap acquisitions reflects feedback on which factors are most important from BIPOC community and survey results as well as priorities from park providers and the regional trails community</li> <li>• Final prioritization of hundreds of trail segments will reflect priorities and feedback from community</li> </ul>
<b>Capital grants</b>	Test participatory budgeting principles through development of pilot to allocate \$4 million to community projects selected through a community process and vote	<ul style="list-style-type: none"> <li>• 2 info sessions on committee recruitment in fall 2021</li> <li>• Partnering with community organizations and individuals to spread the word about the committee recruitment</li> </ul>	<ul style="list-style-type: none"> <li>• Initial capital grants pilot design and review committee established as a result of recommendation from review panel</li> <li>• Capital grants pilot design and review committee will shape pilot guidebook and idea generating</li> </ul>

	Recruit a capital grants pilot design and review committee that reflects the diversity of the region and the requirements laid out in the bond measure	<ul style="list-style-type: none"> <li>• 44 completed applications received of which 7 were selected to serve on the committee</li> <li>• Convene review panel of Metro staff and community members to evaluate applications received</li> </ul>	sessions, which will determine path for community project
<b>Take care of Metro parks</b>	<p>Advance safety, health and accessibility projects that reflect feedback from community during bond development to “take care of what we have”</p> <p>Ensure that major projects at specific Metro sites like Blue Lake and Oxbow regional parks are shaped by community members</p>	<ul style="list-style-type: none"> <li>• Reviewed and analyzed feedback during bond development</li> <li>• Planning to convene a BIPOC partner cohort to help shape the renovation planning at Blue Lake Park</li> <li>• Partnership with Lone Fir Foundation around the project scope and planning for engagement with new partners including the Oregon Chinese Consolidated Benevolent Association, the Mental Health Association of Portland, the Chinese American Citizens Alliance, the Buckman Neighborhood Association, Friends of Lone Fir, the Oregon Chinese Coalition and the Portland Chinatown History Foundation through the process on work to advance a concept for the cultural heritage garden at Block 14</li> </ul>	

**2019 bond spending detail as of December 31, 2021 by program area**

	<b>FY20</b>	<b>FY21</b>	<b>FY22</b>	<b>Total</b>
<b>Protect and Restore land</b>				
Total	128,960	1,870,959	3,348,060	5,347,979
<b>Take Care of Metro Parks</b>				
Total	230,744	3,693,245	1,207,295	5,131,284
<b>Local Share</b>				
Total	29,397	216,142	2,621,373	2,866,912
<b>Nature in Neighborhood Grants</b>				
Total	12,847	186,475	137,348	336,670
<b>Trails</b>				
Total	12,314	244,096	117,799	374,209
<b>Community Visions</b>				
Total	-	3,480	39,387	42,867
<b>Total Program</b>	414,262	6,214,397	7,471,262	14,099,921
<b>Admin</b>				
Total	812,528	1,573,851	1,787,762	4,174,141
<b>Total Bond</b>	1,226,790	7,788,248	9,259,024	18,274,062
<b>Admin percent</b>	66%	20%	19%	23%

## 2006 bond spending detail as of December 31 2021 by program area

<b>Land acquisition, restoration</b>		
	<i>Total spend</i>	<i>Percent of all 2006 bond spending</i>
	156,710,707	56.97%
<b>Local Share</b>		
	<i>Total spend</i>	<i>Percent of all 2006 bond spending</i>
	43,748,643	15.90%
<b>Capital Grants</b>		
	<i>Total spend</i>	<i>Percent of all 2006 bond spending</i>
	16,371,264	5.95%
<b>Construction</b>		
	<i>Total spend</i>	<i>Percent of all 2006 bond spending</i>
	31,310,378	11.38%
<b>Total Program</b>		
	<i>Total spend</i>	<i>Percent of all 2006 bond spending</i>
	248,140,992	90.20%
<b>Admin Total</b>		
	<i>Total spend</i>	<i>Percent of all 2006 bond spending</i>
	26,953,526	9.80%
<b>Total Bond spend</b>		
	275,094,518	
<b>Admin percent</b>		
	9.80%	

## Purpose

This document provides more detail and context about expectations for the Oversight Committee in 2022 by sharing detail about how the committee may wish to conduct oversight and what topics staff anticipates bringing to the committee in 2022. As the committee develops and continues to build its foundations in the year ahead, there will certainly be additional discussions and the topics that the committee will focus on.

## Oversight activities and tools anticipated in 2022

The Metro Council has asked the Oversight Committee to monitor how bond implementation activities are meeting the direction in the bond measure, to monitor financial aspects of program administration and to share back with the Metro Council related concerns or recommendations to help adjust work moving forward including providing oversight on how bond implementation activities are addressing the three bond criteria.

The Metro Council established the Natural Areas and Capital Program Performance Oversight Committee via Ordinance No. 21-1460, which describes the purpose and authority of the Natural Areas and Capital Program Performance Oversight Committee to:

1. Review whether the six programs described in the 2019 Parks and Nature Bond are meeting the goals and objectives established for the program by the Metro Council.

*What does this mean?*

Oversight activities	Tools available
<u>Monitor</u> staff's efforts to implement the bond and make programmatic investments	Quarterly reporting from staff on bond program work to date, bond investments and community engagement activities  Working groups to spend time digging in to specific details of the work
<u>Evaluate</u> outcomes of bond activities and investments	Bond evaluation outcomes project data collection pilot  Refining existing dashboards that display staff work to date

2. Monitor financial aspects of program administration, including review of program expenditures; Review capital expenditures related to the 2016 Parks and Natural Areas Local-Option Levy and the 2006 Natural Areas Bond Measure.

*What does this mean?*

Oversight activities	Tools available
<u>Monitor</u> bond spend, administrative costs from 2019,	Quarterly reporting from staff on bond finance  Working group on bond finance

2006 and levy funded capital investments	
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3. Provide an annual report out to the Metro Council

*What does this mean?*

At least once a year provide a report back to the Metro Council on key issues to note, questions or concerns based on the committee's monitoring, review and evaluation functions. First report back is expected in April 2022.
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## Proposed 2022 Oversight Committee work plan

This year, staff work will move from launching bond programs to advancing bond funded investments in land acquisition, park improvements and allocations to park providers and grant recipients. The details below outline the bond implementation work anticipated in 2022.

Staff anticipates the primary areas for the Oversight Committee to provide review in 2022 includes:

*Collaborate with staff on*

- Reporting tools for Metro's land acquisition work (May 2022 meeting)
- Initial phase of data collection and interpretation for bond evaluation outcomes project (May, September and December 2022 meetings)
- Year two report (December 2022 meeting)

*Review staff work on*

- Process for capital grants pilot when initiated (September 2022 meeting)
- Local share program progress
- Progress of land acquisition work

*Continued to receive regular updates on*

- bond finance reporting and bond spend across programs (quarterly reporting)
- COBID utilization rates (quarterly reporting)
- bond spend on capital projects (quarterly reporting)

*Participate in other optional events and activities to be scheduled*

- Tours of Metro sites/projects
- Working groups

## 2022 bond implementation work plan

### **BOND EVALUATION OUTCOMES PROJECT**

Project to develop a framework to monitor and measure effort and impacts of bond investments over the life of the bond.

**Key activities in 2022:**

- Work with Metro Council to finalize a framework report of the outcomes the bond is working to address
- Launch a pilot to identify a set of metrics and data to collect by late summer 2022

Potential 2022 Oversight committee role

- Review process for initial indicator selection and piloting of data
- Sense-making of findings from initial data collection
- Evaluation of data piloting; identify lessons learned
- Advise on ways to communicate data and lessons learned to public

**PROTECT AND RESTORE LAND**

**\$155 million** allocated for acquisition and restoration of priority habitat across 24 target areas, [www.oregonmetro.gov/protectandrestoreland](http://www.oregonmetro.gov/protectandrestoreland)

**Program description:** Protect and Restore Land builds on the successes of the 2006 and 1995 Natural areas bond measures in protecting and connecting greater Portland’s special places, especially river and stream banks, headwaters, floodplains, wetlands, oak and prairie habitat, forests and culturally significant places, by purchasing land and restoring it in 24 target areas that span the region.

**Key implementation activities in 2022:**

- Purchase land in priority habitats across the region through willing seller program
- Continue to receive feedback from tribal governments on refinement plans

Potential 2022 Oversight committee role

- Hear about individual purchases upon completion;
- Review program progress in meeting Council direction each year
- Raise questions, concerns for staff and Council.
- Help staff shape reporting tools to measure progress on and analysis of land acquisition

**NATURE IN NEIGHBORHOODS CAPITAL GRANTS**

**\$40 million** to community groups, non-profits and local governments for projects that “re-green” or “re-nature” neighborhoods, <https://www.oregonmetro.gov/tools-partners/grants-and-resources/nature-grants>

**Program description:** The Nature in Neighborhoods capital grants program provides up to \$40 million for grants supporting community-led projects that protect and improve water quality and fish and wildlife habitat, support climate resilience and increase people’s experience of nature at the community scale. This program also includes the Nature in Neighborhoods Capital Grants Pilot, which will use a community-centered process to create meaningful opportunities to shape \$4 million for investments selected by the community.

**Key implementation activities in 2022:**



- Launch and support community committee to help design the solicitation for up to \$4 million in grant funding
- Work with community committee to develop a guidebook to launch the solicitation of project ideas in summer 2022.
- Begin to develop the guidebook for the Nature in Neighborhoods grant program to launch in 2023

Potential 2022 Oversight committee role

- Hear about process to develop guidebook and launch the solicitation process for the capital grants pilot

**WALKING AND BIKING TRAILS**

**\$40 million** for building out the regional trails network, [oregonmetro.gov/regional-trails-and-greenways-system](https://oregonmetro.gov/regional-trails-and-greenways-system)

**Program description:** This program provides \$40 million to plan and build out trails that close gaps in the regional trails system via \$10 million for acquisition from willing sellers and roughly \$20 million for competitive grants to local governments to plan, design and build regional trails.

**Key implementation activities in 2022:**

- Purchase land through the willing seller program where Metro and partners will one day build regional trails
- Solicit and review applications from local jurisdictions for trail grants, with grant awards expected to be made by the Metro Council in fall 2022.

Potential 2022 Oversight committee role

- Review program progress in meeting Council direction each year
- Raise questions, concerns for staff and Council

**LOCAL SHARE**

**\$92 million** allocated to local governments for park improvement projects and locally important acquisitions, [www.oregonmetro.gov/localshare](https://www.oregonmetro.gov/localshare)

**Program description:** The local share program distributes \$92 million to 27 park providers (23 cities, 2 counties and 2 park districts) across the metro area to invest in their community’s parks and nature projects including land acquisition, habitat restoration and connectivity, park access facilities at public parks and natural areas, local and regional trails and interpretive or environmental education facilities.

**Key implementation activities in 2022:**

- Reviewing park providers’ project submissions and finalizing agreements to disburse bond funds
- Convening the region’s 27 park providers to share lessons learned around meeting the bond criteria including tribal government engagement

Potential 2022 Oversight committee role

- Receive regular reporting on progress of park providers for identifying and advancing projects
- Hear from a park provider directly on their process

**TAKE CARE OF METRO PARKS**

**\$98 million** for safety and accessibility improvements at Metro parks and facilities across the region

**Program description:** Metro’s regional parks, boat launches and cemeteries areas welcome nearly 2.5 million visitors a year to enjoy nature, exercise and cultural gatherings. The take care of Metro parks program funding is a promise to take care of Metro’s existing sites by addressing capital maintenance, repair and improvement needs at Metro facilities and completing nature parks with adopted master plans.

**Key implementation activities in 2022:**

- Complete a municipal water supply connection to Blue Lake Park and plan for the next phase of maintenance facility and utility improvements. Begin community engagement for Blue Lake Park renovation planning and design.
- Installation of a generator at the Oxbow Welcome Center and completion of maintenance area improvements as part of the Phase 2 of the welcome center and initiate assessment of Oxbow’s potable water system for repair.
- Continue to work with community to advance a vision and design for a cultural heritage garden at Lone Fir cemetery honoring Chinese immigrants and patients from the Oregon Hospital for the Insane
- Continue to plan and prioritize bond funded projects to improve access that meet or exceed ADA standards at Metro parks and facilities across the region

Potential 2022 Oversight committee role

- Review regular reporting on capital project expenditures (bond and levy if relevant)

**LARGE-SCALE COMMUNITY VISIONS**

**\$50 million** for green investments in regional transformative projects

**Program description:** The Metro Council created the large scale community visions program to fund regionally significant catalytic investments that re-green communities and connect parks and nature with other community assets such as transportation and affordable housing. \$20 million is set aside for the Willamette Falls Legacy Project.

**Key implementation activities in 2022**

- Work with the Metro Council to finalize more detailed program parameters and guidance by spring 2022.

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Phase	1. Build toward year one report		2. Build tools for committee work	3. Gather data and information	4. Review and report
Purpose of phase	Finalize year one report out to the Metro Council		Refine tools for quarterly reporting from staff to the committee	Launch effort for year 2 committee report by	Shape content and format for first year report to Metro Council
Timing	Feb 22 working sessions	March 3 meeting	May 2022 meeting	September 2022 meeting	December 2022 meeting
Activities projected and documents for review	<ul style="list-style-type: none"> <li>Review staff report in working groups</li> <li>Identify committee questions, concerns, issues to highlight in the report and focus on in 2022</li> <li>Committee member re-appointments and co-chairs</li> </ul>		<ul style="list-style-type: none"> <li>Optional tours of Metro sites if safe</li> <li>Review tools for reporting on bond funded land acquisition work</li> <li>Continue working groups</li> <li>Update on bond evaluation outcomes</li> </ul>	<ul style="list-style-type: none"> <li>Early findings from Parks and Nature staff developed annual report</li> <li>Sense-making and review of early findings from bond evaluation outcomes data collection</li> </ul>	<ul style="list-style-type: none"> <li>Development of oversight committee year 2 report to Council</li> <li>Committee work plan for 2023</li> </ul>

## Parks and Nature Bond

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**From:** Daniel Stuart <daniel@nw-trail.org>  
**Sent:** Wednesday, March 2, 2022 3:56 PM  
**To:** Parks and Nature Bond  
**Subject:** [External sender]Request to testify at Natural Areas and Capital Program Performance Oversight Committee

**Follow Up Flag:** Follow up  
**Flag Status:** Flagged

**CAUTION:** This email originated from an **External source**. Do not open links or attachments unless you know the content is safe.

Hi,

I would like to request to testify at tomorrow's meeting. I intend to speak about how the siloed approach to the budget apportionment between programs gives insufficient weight to projects that would achieve the objectives of multiple program areas.

Thanks,

Daniel

## Parks and Nature Bond

---

**From:** Parks and Nature Bond  
**Sent:** Thursday, March 3, 2022 12:14 PM  
**To:** Parks and Nature Bond  
**Cc:** MG Devereux; Beth Cohen; Melanie Reinert  
**Subject:** For oversight committee: Testimony to March 3 meeting of Natural Areas and Capital Program Performance Oversight Committee  
**Attachments:** Metro Parks and Nature Oversight 220302.pdf; ATT00001.htm

Dear Committee Members,

Please find the written component of Dr. Fruits' testimony for the March 3 meeting attached and below.  
Sincerely,

Melanie Reinert (she/her)  
Strategic Funding Administrative Specialist  
[melanie.reinert@oregonmetro.gov](mailto:melanie.reinert@oregonmetro.gov)

<https://www.oregonmetro.gov/public-projects/parks-and-nature-funding>

---

**From:** Eric Fruits [mailto:[eric@cascadepolicy.org](mailto:eric@cascadepolicy.org)]  
**Sent:** Wednesday, March 2, 2022 10:01 AM  
**To:** Parks and Nature Bond <[ParksandNatureBond@oregonmetro.gov](mailto:ParksandNatureBond@oregonmetro.gov)>  
**Subject:** [External sender]Testimony to March 3 meeting of Natural Areas and Capital Program Performance Oversight Committee

**CAUTION:** This email originated from an **External source**. Do not open links or attachments unless you know the content is safe.

I have attached my written testimony to the Committee for inclusion the March 3 meeting packet.

Also, I would like to provide oral testimony to the Committee.

I am requesting closed captioning for the meeting.

All the best.

--  
Eric Fruits, Ph.D.  
Vice President of Research  
Cascade Policy Institute  
503-928-6635  
[eric@cascadepolicy.org](mailto:eric@cascadepolicy.org)



**Eric Fruits, Ph.D.**  
Vice President of Research  
eric@cascadepolicy.org

4850 SW Scholls Ferry Rd., Suite 103  
Portland, OR 97225

www.cascadepolicy.org  
503-242-0900

March 2, 2022

Natural Areas and Capital Performance Oversight Committee  
Metro

**Re: Issues to address in forthcoming annual report to Metro Council**

Dear Committee Members:

I have been following Metro's Parks and Nature program for several years and have a deep understanding of the program. I believe Metro has failed to deliver the parks and nature programs the people of this region expected, as described in my previous testimony to this committee:

- **Metro has no business owning land outside of its jurisdiction or the UGB.** Metro voters approved the measures and Metro property taxes to fund the program. **Any land purchases should provide a direct benefit to Metro residents**, not an indirect or intangible benefit to some undefined broader "region."
- Our [research](#) found that **less than 15% of Metro's parks and nature land are accessible to the public.** Even worse, **most of Metro's acquisitions are intentionally kept secret from voters.** As an oversight committee, you have a duty to report to Metro Council and the larger community how much of Metro's parks and nature land is off-limits to public use.
- **Metro's Parks and Nature program should not be purchasing any land zoned for residential use.** The Portland region has a shortage of housing and a shortage of land to build housing. Residential land should not be locked up and away from our growing population.
- **Parks and nature funds should not be used to purchase land for active farming or any commercial enterprise.** This is Metro's *parks and nature* program. Voters and taxpayer expect their money to be spent to provide parks and protect nature, not to turn the regional government into a landlord for commercial enterprises.
- Metro needs to **rein in the administrative costs** for the Parks and Nature program, without resorting to cost-shifting and/or accounting gimmicks.

As you begin the process of preparing your first annual report as an Oversight Committee, I urge you to consider these points, as well as several additional issues, which I describe below.

### MISMATCH OF REPORTED SPENDING

At the Feb. 22 meeting, you were provided a Staff Report on “bond work” and spending under the local option levy.

Page 10 of the Staff Report provides a breakdown bond spending by category. Page 11 of the Staff Report provides spending on “specific projects.” The table below shows that the totals from Page 10 and Page 11 are pretty close. **But, if you look at how the money was spent, things don’t line up.** There is simply no way to match the categories on Page 10 with the projects on Page 11. Something is amiss.

<u>Page 10 Information</u>		<u>Page 11 Information</u>	
Protect and restore lands	\$5,300	Acquisition: Sandy River/Dairy McKay Creek	\$2,700
Metro parks	5,100	Local share: Gresham/Shaul	2,500
Local share	2,900	Metro parks: Chehalem Ridge	5,300
Capital grants	337	Metro parks: Newell Creek	2,900
Walking and biking trails	374	Metro Parks: Blue Lake	337
Large-scale community visions	43	Metro Parks: Oxbow	296
Administrative costs	4,170	Administrative costs	4,170
<b>Total</b>	<b>\$18,224</b>		<b>\$18,203</b>
Admin share	23%		

I suspect that Page 11 includes local option levy spending. If that’s the case, then the Staff Report is not giving a complete picture and the fact the totals are “close enough for government work” may be just a coincidence.

It’s time to roll up your Oversight Committee sleeves and demand a complete accounting of how and where taxpayer dollars are being spent.

### HOW MUCH IS METRO SPENDING AND WHERE IS IT COMING FROM?

The spending at the end of the Staff Report is even more puzzling. Page 21 provides *year-by-year* spending on the 2019 bond, but Page 22 provides only the *total* spending over the *life* the 2006 bond. As you know, the Oversight Committee’s last annual report was released in Dec. 2019. At a minimum Metro staff should provide you an accounting of spending since that last report.

You may ask, “Who cares?” The answer is you should care.

In 2006, voters [authorized](#) spending of \$227.4 million in three specific categories. In contrast, **Page 22 of the Staff Report shows more than \$275 million in spending, or about 20% more than voters expected**, as shown in the table below. All of this extra money was spent on “construction” and “admin”—programs that voters did not authorize.



<b>2006 Bond Spending Category</b>	<b>Authorized by Voters</b>	<b>Page 22 Information</b>	<b>Difference</b>	
Purchase regionally significant natural areas	\$168,400	\$156,711	-\$11,689	-6.9%
Local share	44,000	43,749	-251	-0.6%
Nature in Neighborhood grants	15,000	16,371	1,371	9.1%
Construction		31,310	31,310	
Administrative costs		26,954	26,954	
<b>Total</b>	<b>\$227,400</b>	<b>\$275,095</b>	<b>\$47,695</b>	<b>21.0%</b>
Admin share		9.8%		

Metro staff will say that the \$48 million in extra money came from bond premiums that Metro received [because](#) of its “AAA bond rating and strong financial position.”

But that’s not the whole story. The whole story includes the fact that **Metro was offering above-market interest rates to investors** on its Parks and Nature Bonds. If a bond issuer offers above-market rates of interest, then the bond market will offer a [premium](#) for those bonds.

You may naively think to yourself, “That’s awesome, Metro got more money than expected!” Yes, they did. But, that also means **taxpayers are paying higher property taxes** to cover the interest payments. It also means that **Metro is spending 20% more than they promised they’d spend—on projects never approved by voters.**

I’m sure you’ve heard Metro councilors and staff repeat their overused expression, “promises made, promises kept.” In this case, that phrase is false. On the 2006 bond, Metro is spending about 20% more than they promised voters. The Oregonian [explains](#) what’s wrong with this (emphasis added).

And the way [bond premiums] are being used—to increase total proceeds beyond the specific amount voters approved—**raises questions about transparency and accountability**, and whether some borrowers, with the aid of investment bankers, are **breaking faith with taxpayers.**

“I don’t think the practice is illegal under Oregon statutes, but **I do think it is unsavory and one that violates the trust between governments and their taxpayers**, even if the latter never realizes it,” said Eric Johansen, the long-time debt manager for the City of Portland until his retirement in 2018.

As an Oversight Committee, you have a duty to voters and taxpayers to ensure these sorts of shenanigans do not continue with the 2019 bond.

Respectfully submitted by:

/s/ Eric Fruits

## Parks and Nature Bond

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**From:** Parks and Nature Bond  
**Sent:** Wednesday, March 2, 2022 2:56 PM  
**To:** eric@cascadepolicy.org  
**Cc:** Parks and Nature Bond  
**Subject:** RE: [External sender]Testimony to March 3 meeting of Natural Areas and Capital Program Performance Oversight Committee

**Follow Up Flag:** Follow up  
**Flag Status:** Completed

Hi Dr. Fruits—

Thank you for your testimony. We want to acknowledge receipt of it and let you know that we'll be sharing your testimony with the Natural Areas and Capital Program Performance Oversight Committee and you'll also have the opportunity to provide oral testimony during the beginning of the meeting tomorrow.

We'll be using closed captioning at our meeting tomorrow and if you have additional needs before tomorrow's meeting let us know.

Thanks,

Parks and Nature bond team

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**From:** Eric Fruits [mailto:eric@cascadepolicy.org]  
**Sent:** Wednesday, March 2, 2022 10:01 AM  
**To:** Parks and Nature Bond <ParksandNatureBond@oregonmetro.gov>  
**Subject:** [External sender]Testimony to March 3 meeting of Natural Areas and Capital Program Performance Oversight Committee

**CAUTION:** This email originated from an **External source**. Do not open links or attachments unless you know the content is safe.

I have attached my written testimony to the Committee for inclusion the March 3 meeting packet.

Also, I would like to provide oral testimony to the Committee.

I am requesting closed captioning for the meeting.

All the best.

--  
Eric Fruits, Ph.D.  
Vice President of Research  
Cascade Policy Institute  
503-928-6635  
[eric@cascadepolicy.org](mailto:eric@cascadepolicy.org)

## Parks and Nature Bond

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**From:** Parks and Nature Bond  
**Sent:** Thursday, March 3, 2022 12:14 PM  
**To:** Parks and Nature Bond  
**Cc:** MG Devereux; Beth Cohen; Melanie Reinert  
**Subject:** FW: Re. Dec. 2021 and Feb. 2022 testimony to the Metro Natural Areas and Capital Program Performance oversight committee  
**Attachments:** winter 2022 staff report to natural areas oversight committee\_final draf....pdf

Dear committee members,

Please find the response to Dr. Fruits December 2021 and February 2022 testimony below.

In addition, he has provided written testimony for the March 2022 meeting, which we will forward to you momentarily.

Thank you,

The Parks and Nature bond team

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**From:** Parks and Nature Bond  
**Sent:** Thursday, March 3, 2022 12:08 PM  
**To:** eric@cascadepolicy.org  
**Cc:** Parks and Nature Bond <ParksandNatureBond@oregonmetro.gov>  
**Subject:** Re. Dec. 2021 and Feb. 2022 testimony to the Metro Natural Areas and Capital Program Performance oversight committee

Dr. Fruits—

Thank you for submitting your testimony to the Natural Areas and Capital Program Performance oversight committee before the committee's December 2021 and February 2022 meetings. The committee has received your testimony on both occasions.

The 2019 parks and nature bond measure is a promise made to build on the region's legacy of protecting clean water and improving fish and wildlife habitat and connecting people with nature close to home. Independent community oversight has been essential to ensuring that Metro can keep delivering on promises made to voters as we have done for the past 25 years. The oversight committee provides this important service and a place for the public and interested parties to learn about the bond work to date and share questions and concerns.

Thanks for sharing your thoughts and questions with the committee. See below for Metro's responses to the questions and comments you raise. The information below will also be shared with the oversight committee.

### Oversight committee meetings and public notification requirements

Thank you for your comments regarding Metro's method of notice for oversight committee meetings. Metro posts the date, time, contact person and link to the committee meeting agenda, including the topics that the committee will discuss, on both Metro's website and the agency calendar. In addition, Metro includes the meeting dates and times in the monthly bond refinement newsletter, which interested parties receive via email. To address your concerns about notice, at your request Metro will include you in the list of interested parties who receive the bond refinement newsletter. Metro also will post notice of oversight committee meetings in the Daily Journal of Commerce.

These meetings are public and anyone is able to attend and watch in real time or review meeting recording and minutes. After each meeting, we post the meeting recording, minutes and any relevant materials that were discussed or presented at the meeting. You can find those on our [website](#). We also provide opportunities to request accommodations like closed captioning for interested parties to better access the discussion.

Above and beyond the legal requirements for public meetings, Metro is working to make our virtual spaces as accessible as possible, which includes responding to the feedback from meeting attendees. As we identify gaps in our notification or missing steps regarding access to our meetings, we'll remedy those. We appreciate your feedback and Metro will examine ways to make the committee meetings as accessible to all who are interested, both inside and outside a virtual space.

#### Commercial farming on parks and nature lands

Sometimes land that has been identified as important to protect the region's water quality, fish and wildlife habitat, and to connect people to nature is in farm use or includes residential structures. It is often impermissible to divide land parcels to buy or sell just a portion. In addition, Metro does not consider all residential or agricultural use as detrimental to its conservation goals, and instead works to implement conservation strategies which may integrate with these uses as appropriate.

After a new acquisition, Metro often takes several years to study a site. In general, no major changes are made in the near term. In the short term, for example, invasive weeds might be treated, failing septic systems and dilapidated structures might be removed and other initial maintenance work done. Land currently farmed often continues to be leased for agricultural use. Metro has restored more than 300 acres of former agricultural land back to native habitat, and another 1,320 acres continue to be leased for farming. Metro tracks the private activity generated by these lease payments and is in compliance with applicable state and federal law and bond requirements.

In 1997 (Resolution 997-2483), 2003 (Resolution 03-3325), 2013 (Resolution 13-4449) and again in 2014 (Resolution 14-4536) the Metro Council affirmed the value of leasing agricultural land as an interim management tool that provides benefits to Metro and the regional agricultural economy. Agricultural leases ensure that farmland will be continually cultivated, which corresponds to good farmland management, and reinforce Metro's support of the local agricultural economy while providing stability to the lands it manages. The 2019 parks and nature bond measure reemphasized this commitment to the regional agricultural economy by supporting protection of natural resources on working lands and increasing access to sustainably managed working lands.

#### Bond administrative spending to date

The voters of the region asked Metro to do our work differently with this bond and develop six new bond program areas. Doing that work requires staff time and attention to launch these programs effectively. The focus over the last year-plus on developing six new program areas has meant that bond spending overall appears low. Additionally, there are many administrative costs Metro has had to incur to shape the programs. As with other voter investments, administrative expenses tend to be highest in the first few years as new programs are being built. Once the programs are up and running, the rate of administrative spending as a percentage of total spending will decrease before a small uptick in the last few years of the life of the bond measure. We fully expect administrative expenses with the 2019 parks and nature bond measure to do the same

Parks and Nature has committed to maintaining a 10 percent administrative cost for the 2019 parks and nature bond over the lifetime of the bond. The 2006 natural areas bond measure's administrative cost was under 10 percent over its lifetime, and we expect the 2019 bond administrative costs over the life of the bond to be under 10 percent as well.

The current administrative spending for the 2019 parks and nature bond measure is \$4.17 million, representing 23 percent since bond spending began and staff is paying close attention to this figure over time. Staff expect this percentage will go down as bond capital spending ramps up this year and beyond.

The [Parks and Nature annual report](#), released every fall, provides high-level information on bond spending.

The draft staff report that the oversight committee has been reviewing includes a breakdown on bond spending to date and you can find a copy of that draft report attached to this email.

#### Bond dollars spent inside and outside the urban growth boundary

With the expertise of Metro's science, land management and real estate staff, along with a public engagement process, Metro establishes goals and priorities for land acquisition. When the two natural areas bond measures were on the ballot in 1995 and 2006, they included very specific regional geographies, or target areas, that laid out where Metro would try to buy available high-quality habitat. There are 24 regional target areas identified in the 2019 bond measure.

Everything Metro buys is within one of those target areas. Some of them are in fairly urban areas, and some of them are a little bit outside of urban areas but are still very accessible. In a region as developed as ours, some of the best habitat is slightly removed from urban areas that have already developed. As our region continues to grow, some of the natural areas that seemed a little farther out when they were purchased are now part of developed neighborhoods, like Cooper Mountain Nature Park. That foresight from years ago now allows people to connect with nature close to home.

Some of the properties include rare, native habitats that aren't found in more developed areas. For instance, in the case of Killin Wetlands, the habitat there is a very rare example of Willamette Valley scrub-shrub marsh habitat that was common before white colonists settled in the area. Even though an acquisition might be outside the urban growth boundary, the properties are still a part of watersheds that provide drinking water, and other environmental benefits, for residents in the region. For instance, properties in western Washington County are a part of the larger Tualatin River Watershed, which provides drinking water for hundreds of thousands of Washington County residents and businesses. Everybody shares in the benefits of clean water. Many properties also serve as biodiversity corridors that provide connections for wildlife to access more habitat.

The impact of Metro bond spending to protect and restore special places throughout the region is significant. As of October 2018, Metro's 1995 and 2006 parks and nature bonds had funded \$212 million dollars to protect 6,200 acres inside the urban growth boundary. The same time period saw \$89 million dollars protect 9,500 acres outside the urban growth boundary.

Sincerely,

The Parks and Nature bond team