



Parks and Nature Bond:
Establish goals and performance measures for public access

June 2023
A Report by the Office of the Auditor

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Knighton Award for Auditing

Audit receives recognition

The Office of the Metro Auditor was the recipient of the “Distinguished Award” for Small Shops by Association of Local Government Auditors (ALGA). The winning audit is entitled “Affordable Housing Bond Preparedness: Develop Clear and Consistent Guidance to Improve Bond Operations.” Auditors were presented with the award at the ALGA conference in Dallas, Texas in May 2022. Knighton Award winners are selected each year by a judging panel of peers and awards are presented at the annual conference.

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MEMORANDUM

June 21, 2023

To: Lynn Peterson, Council President
Ashton Simpson, Councilor, District 1
Christine Lewis, Councilor, District 2
Gerritt Rosenthal, Councilor, District 3
Juan Carlos González, Councilor, District 4
Mary Nolan, Councilor, District 5
Duncan Hwang, Councilor, District 6

From: Brian Evans, Metro Auditor

Re: Audit of Parks and Nature Bond Measure

This report covers the audit of the 2019 Parks and Nature bond measure. The purpose was to determine if Metro was prepared to increase access to nature as envisioned in bond commitments. It assessed the clarity of public access goals, current access levels, and opportunities to increase access.

The audit found lack of clarity about what specific outcomes the bond sought to accomplish related to access to nature. Access was not defined, and no specific access goals were set. The audit also found limitations to public access in the current land portfolio. One limitation to access was the orientation towards habitat and land conservation. The other limitation was barriers getting to and experiencing Metro-owned land.

The bond's role in increasing access was mainly focused on funding partners. However, some recent trends indicate that local jurisdictions may be moving away from new access projects to focus on deferred maintenance. To meet bond commitments, Metro may need to prioritize public access on its own land to a higher degree than it has in the past.

We have discussed our findings and recommendations with Marissa Madrigal, Chief Operating Officer; Jon Blasher, Parks and Nature Director; and Beth Cohen, Strategic Funding Program Manager. I would like to acknowledge and thank all of the employees who assisted us in completing this audit.

Summary

Voters approved Metro's \$475 million Parks and Nature Bond in November 2019. The overarching purpose and intent of the bond was to make the region a more livable place for everyone. The bond's guiding principles included commitments to access and equity:

- Connect more people to the land and rivers of our region.
- Invest in trails for biking and walking.
- Support community-led parks and nature projects.
- Make parks and natural areas more accessible and inclusive.
- Take care of what we have.
- Advance racial equity through bond investments.
- Serve communities through inclusive engagement, transparency and accountability.

The audit found lack of clarity about what specific outcomes the bond sought to accomplish related to access to nature. Access was not defined, and no specific access goals were set.

The audit also found an underdeveloped performance measurement system overall, and specifically for measuring equitable access. Developing performance measures for each bond program would create a vision of what success should look like.

The bond's role in increasing access was mainly focused on funding Metro's partners rather than investing in increased access on Metro-owned land. Local Share and three grant programs could support access to varying degrees, but it will depend on what projects are selected for funding.

To meet the bond commitments, Metro may need to prioritize public access on its own land to a higher degree than it has in the past. Land purchased through previous bond measures provide opportunities for Metro to increase public access. However, the audit found limitations to accessing the land.

Metro's land purchases have been oriented towards land and habitat conservation. Data showed 17% of acquisitions since 2006 were ranked as high for access potential which indicates that most land purchases were not intended for public access.

Travel time analysis showed some sites may not be easily accessible without a personal vehicle. Visits to eight natural areas showed some obstacles for accessing the sites. These included the availability of information online, amenities, signage, and maintenance.

The audit included eight recommendations. Five were intended to ensure the bond delivers on its commitments by strengthening the performance measurement system related to public access and equitable access goals. One recommendation focused on clarifying the long-term vision for the land Metro owns. Two were targeted at using community engagement and feedback in parks and nature work.

Background

Voters approved Metro's \$475 million Parks and Nature Bond in November 2019. The bond was intended to fund natural area and water quality protection, and to connect people to nature. Similar bonds were approved by voters in 1995 (\$135.6 million) and 2006 (\$227.4 million).

A major difference between the 2019 bond and previous bonds was the focus on climate resilience, community engagement, and racial equity. These criteria were intended to be incorporated into all bond programs and projects. Taking care of Metro parks, purchasing property in the Metro region, and funding community visions were also prioritized in the 2019 bond.

The overarching purpose and intent of the funds was to make the region a more livable place for everyone. Investing in parks and nature was identified as an urgent action for the region. Bond documents stated that communities – particularly communities of color and other historically marginalized communities – still await equitable access to the benefits of public investments.

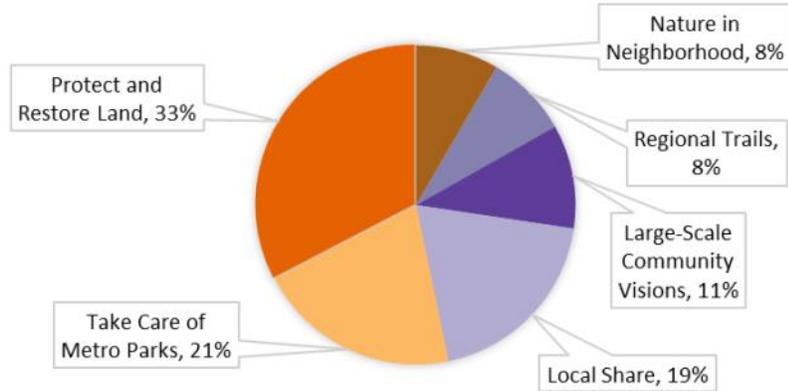
The bond draws from previous plans. One of which was Metro's Strategic Plan to Advance Racial Equity, Diversity, and Inclusion. Another was the 2016 Parks and Nature System Plan that summarized Metro's Park and Nature mission and role to create and maintain a regional system of parks and natural areas. The System Plan included an operating model as a tool for analyzing decisions about new acquisitions and operating sites. It states that Metro's vision will succeed only if it benefits diverse communities across the region. The plan also made a commitment to doing a better job serving people of color and low-income communities.

The bond consists of six programs with dedicated amounts for each.

- Protect and Restore Land: \$155 million for land acquisition, stabilization, and projects. Twenty-four regional target areas eligible for bond funding.
- Take Care of Metro Parks: \$98 million to address capital maintenance, repair, and improvements at Metro facilities. Funding was also dedicated to completing nature parks that were under construction, creating new parks, and improving access opportunities.
- Local Share: \$92 million allocated to 27 local jurisdictions for projects. The funds were allocated based on population and designed for jurisdictions to purchase properties for public access or enhance existing access.
- Large Scale Community Visions: \$50 million for large projects that achieve community benefits like job opportunities, affordable housing, and safe and reliable transportation. The program dedicated \$20 million for the Willamette Falls Legacy Project and riverwalk in Oregon City.
- Nature in Neighborhoods Capital Grants: \$40 million for competitive capital grants to fund public-private partnership projects, including a pilot for community-based participatory grantmaking.

- Regional Trails (RT): \$40 million to support master planning, land acquisition, and construction. This program also included grants for local jurisdictions to build segments of regional trails.

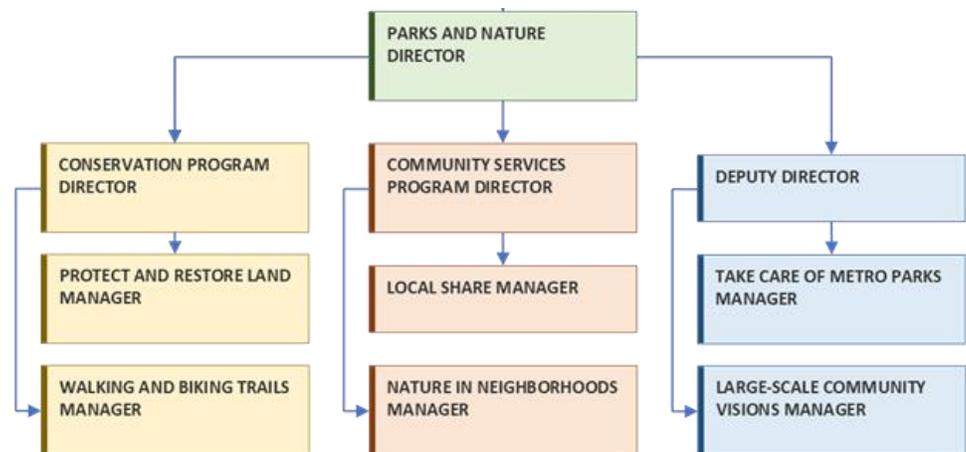
Exhibit 1 Bond funds are allocated to six programs



Source: Auditor’s Office analysis of bond program documents

Bond funds are administered by Metro’s Parks and Nature department. Their work is also supported by the Office of Metro Attorney; Finance and Regulatory Services; Human Resources; Communications; and the Construction Project Management Office. Leadership is provided by the department director, deputy director, two program directors and six program managers. The department budgeted for 38.9 full time equivalents for bond work in FY 2022-23.

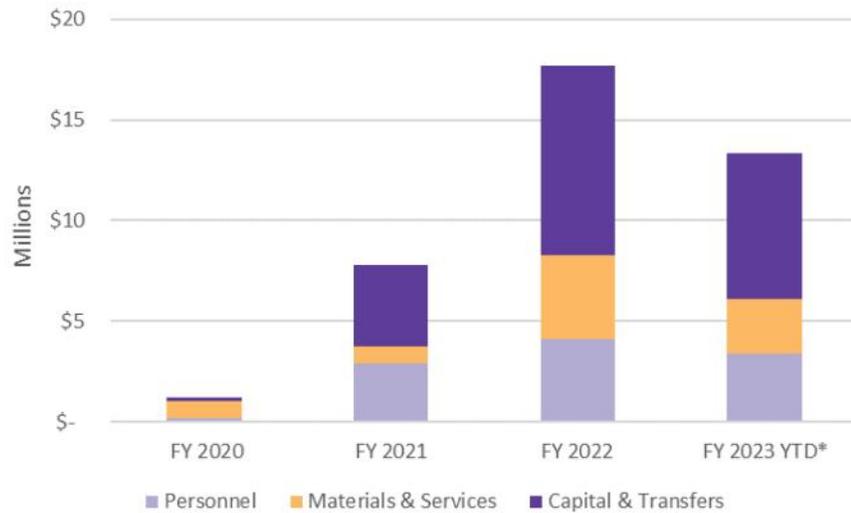
Exhibit 2 Bond work is managed by the Parks and Nature department



Source: Auditor’s Office analysis of Parks and Nature organizational chart and PeopleSoft human resources data.

Spending over the first three fiscal years of the bond averaged \$8.9 million per year and total spending through April 13, 2023 was about \$40 million. An independent oversight committee was appointed to review progress for Metro Council and the region’s residents. The committee’s responsibilities include oversight of Metro’s efforts to meet the racial equity and climate resiliency criteria and outcomes described in the bond.

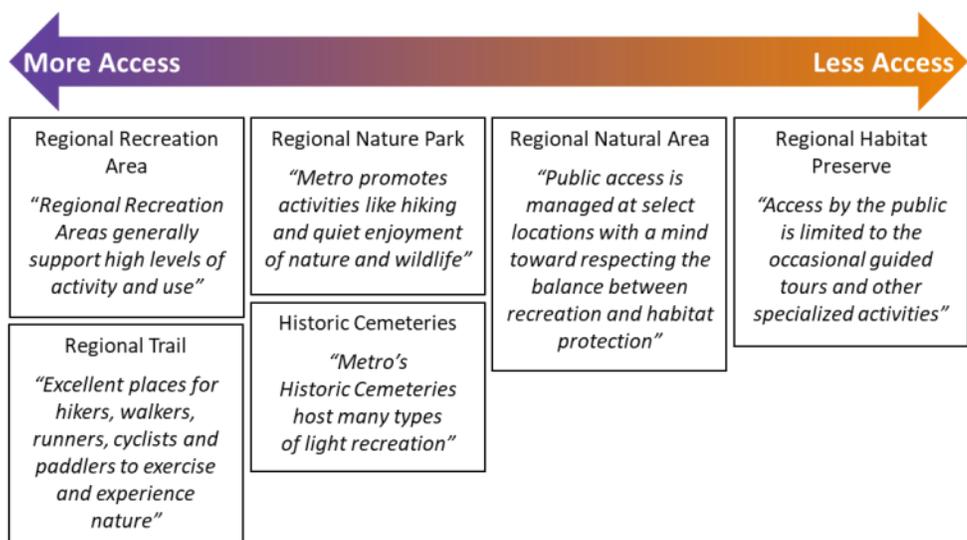
Exhibit 3 About 8% (\$40 million) of bond funds have been spent*



Source: Auditor’s Office analysis of Parks and Nature data.
*As of April 13, 2023

Metro owns around 19,000 acres of land. The land is categorized into six classifications based on its purpose and level of public access. While all land is open to the public, except where legally prohibited, Metro encourages public access on some sites more than others. Sites with formal access have facilities such as parking, trails, signs, and restrooms. At other sites, public access is more limited due to agriculture agreements, lack of facilities, or habitat restoration. These sites are categorized as informal access or no access, and Metro does not encourage public use.

Exhibit 4 Land classifications and their expected level of public access



Source: Auditor’s Office analysis of 2016 Parks and Nature System Plan.

Results

The audit found a lack of clarity about what was intended to be achieved related to public access. There was an underdeveloped performance measurement system for evaluating access. To meet bond commitments, Metro may need to prioritize public access on its own land to a higher degree than it has in the past.

The audit also found limitations to public access in the current land portfolio. One limitation to access was the orientation towards habitat and land conservation. The other limitation was barriers to getting to and experiencing Metro land. Limited public transit options made it more difficult to get to some sites. Inconsistent signage, parking, and public amenities could prevent the public from feeling welcome when they get to some sites.

The audit assessed the potential of each bond program to increase access. The analysis included current allocations, spending-to-date, and an estimate of how much may be spent on new parks. Several bond programs have the potential to increase access, but only one is predominantly focused on creating new access to nature. There are several possible options to increase access. Metro and the Oversight Committee will have to assess tradeoffs among the numerous priorities to meet the bond's commitments.

Greater clarity needed to define access expectations

The audit found lack of clarity about what specific outcomes the bond sought to accomplish related to access to nature. Commitments to increase access were included in the summary, principles and program criteria, but access was not defined, and no specific access goals were set. One bond principle was *to connect more people to the land and rivers of our region*, and a community engagement criterion was *to improve the accessibility and inclusiveness of developed parks*.

In the bond, access was referred to in several contexts including access to newly purchased properties and access for specific groups such as those with specific abilities or from marginalized communities. These examples illustrated important considerations of access and equity. However, without a clear vision of success for access, staff may not have a clear direction for what strategies and activities should be prioritized.

In addition to access, the bond prioritized equity and equitable access. A specific definition for equitable access was not given. However, the bond suggests that equitable access might reduce inequities of access. The importance of equitable access was emphasized in many bond documents.

One bond principle was to advance racial equity through investments. Program documents noted that communities of color and other historically marginalized communities still await equitable access. The concept of equitable access might include historically marginalized communities' ability to utilize sites including their proximity to neighborhoods and amenities like suitable trails for people with different abilities. Bond documents suggest that access is focused on investments that support the general public using nature and equitable access emphasizes benefits for historically marginalized communities.

Exhibit 5 Bond principles included commitments to access and equity

- Connect more people to the land and rivers of our region.
- Invest in trails for biking and walking.
- Support community-led parks and nature projects.
- Make parks and natural areas more accessible and inclusive.
- Take care of what we have.
- Advance racial equity through bond investments.
- Serve communities through inclusive engagement, transparency and accountability.

Source: Metro Council Resolution 19-4988.

The bond committed to equity and the inclusion of historically marginalized communities in decision making processes. Criteria for Racial Equity and Community Engagement includes the prioritization of projects and needs identified by communities of color, Indigenous communities, low-income and other historically marginalized groups. Some examples of equity were described, but clarifying definitions and goals around access to nature and equitable access could be valuable for creating clear actions plans.

In the absence of a definition of access, the audit used the community feedback related to the bond’s development and implementation to create a conceptual model of what access could mean. The model identified three main groupings:

- the ability to get to a site,
- the experience of being at a site, and
- the personal benefits gained from connecting with nature.

Exhibit 6 Community expressed multifaceted needs for nature access

Getting to nature

- Information availability
- Cost
- Logistical ease: sidewalks, transportation, parking
- Proximity to home

Leaving nature; benefits gained from being in nature

- Mental health
- Physical health
- Spiritual health
- Community health
- Family connection

Being in nature; the experience

- Programming
- Cultural activities
- Gathering spaces
- Amenities
- ADA
- Safety
- Feeling welcome
- Terrain of the land
- Maintenance of sites
- Connection to nature
- Connection to culturally significant plants, or spaces

Source: Auditor’s Office analysis of bond community engagement reports.

Metro's community engagement indicated that increased access could include several elements such as developing new sites, increasing site amenities to make them easier to use, and providing information online about sites. Community feedback suggested that Metro should prioritize equitable access. For example, one of the primary needs and goals identified by Black, Indigenous, and People of Color (BIPOC) was increasing access to nature close to neighborhoods where those communities live. They recommended that Metro identify where historically marginalized communities needed increased nature access and work with members of the community to address the need.

Summaries of community feedback indicated different opinions about the need for new parks. Bond leadership appeared to be primarily focused on community engagement messages that supported taking care of existing sites, but not those on increasing access at new sites. One engagement report stated that the desire for new nature parks came up less than taking care of existing nature parks, but also noted support for developing new parks.

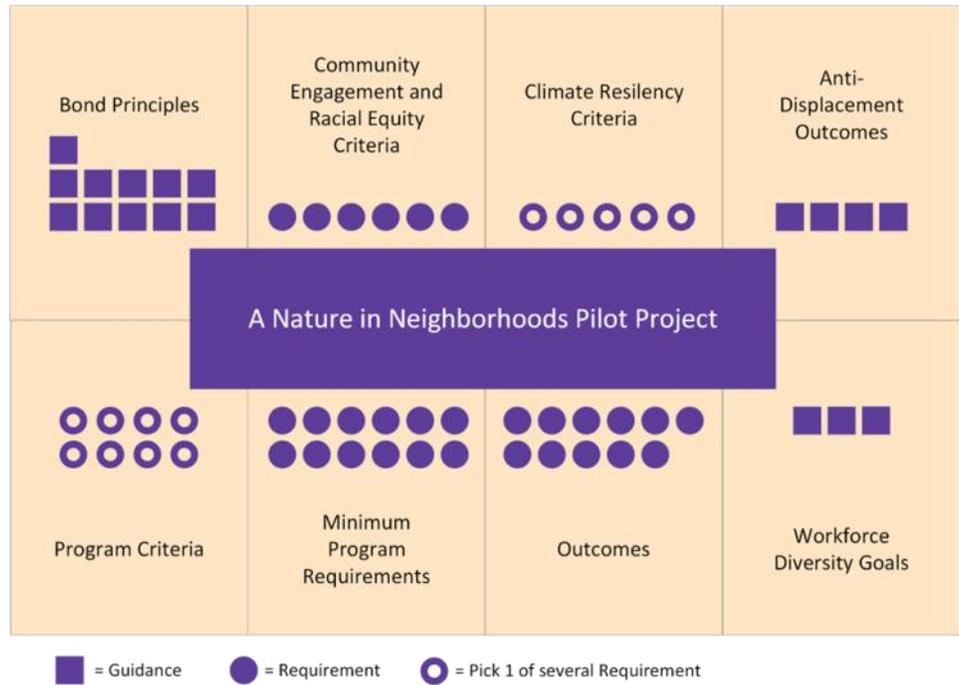
Given these variations, it is important to define what aspects of access the bond is expected to deliver. Some community members who provided feedback expressed distrust of Metro's intentions to implement what was shared during community listening sessions. Some participants felt that their needs and priorities were not addressed in the past. The role of community engagement outlined in the bond was to continue to build trust and relationships. If the funds do not deliver results around access, it risks not efficiently using the time and resources spent engaging community. It could also make it more difficult to gather feedback in the future.

Underdeveloped systems to define and prioritize goals

Even if there were clear definitions of access and equitable access, the number of goals outlined in the bond may not result in improvements without additional prioritization. The audit found that the volume of goals puts accountability and effectiveness at risk. In addition to the principles and criteria that apply to the entire bond, there were additional criteria for each of the six programs.

The average number of goals for a program was 47. Goals were documented in the authorizing resolution, grant handbooks, refinement plans, Intergovernmental Agreements, and a draft of the evaluation framework. For example, a project in the Nature in Neighborhoods Community Choice pilot program was expected to address up to 60 criteria, principles, requirements, and outcomes.

Exhibit 7 Grants in the Nature in Neighborhoods Community Choice program have to address up to 60 elements



Source: Auditor’s Office analysis bond program documents, Construction Career Pathways Framework, and Nature in Neighborhoods program Handbook .

The challenge of managing so many goals could be mitigated with an effective prioritization system. However, the audit found the system was underdeveloped. The bond lacked clarity for which programs were responsible for meeting which principles and there were mixed messages.

For example, we heard that the Protect and Restore Land program was focused on achieving conservation goals. However, the program created a new Urban Target Area with the intention to impact equity and access. Three of nine questions asked to community members in a public engagement process were categorized as access to nature, indicating access was an important part of program activities.

Most programs had underdeveloped prioritization systems to address bond principles and criteria. Some criteria required one element to be met out of several possible options. We could not determine if the intention was to have a balanced distribution among the options or if one criterion should be prioritized.

For example, in the Local Share program projects must meet one of ten criteria. If every Local Share project sought to address the same criterion it could result in an abundance of projects with the same goal, but none of the other goals. Alternatively, if one project were selected for each goal it could result in small progress on each without a significant impact on any of them.

Underdeveloped performance measurement system

The Regional Trails program developed and used a tool for prioritizing investments among competing goals, including access to nature, which could be a model for the other programs. Development of the tool was shaped through community engagement. It resulted in six measurable factors on which each potential investment would be assessed. The output of this tool was a ranked project list that included considerations for access and neighborhood demographics. This tool was a possible example of using a data-driven process to prioritize investments by synthesizing program-specific activities and goals with the overall set of principles.

The audit found an underdeveloped performance measurement system overall, and specifically for measuring equitable access. Developing performance measures for each program would provide direction to staff, Metro's partners, and the public to create a vision of what success should look like.

We did not find any quantified measures for equitable access. We reviewed a draft of the bond evaluation framework which was being developed during the audit. The draft included statements of intended outcomes within the next 20 years. Some outcomes emphasized equitable access such as *community members in park-deficient neighborhoods experience increased access to nearby natural areas*. Performance measures with specific quantifiable indicators could provide a more precise and clear direction.

Metro has had some success when it set specific performance targets in the past. In 2004, Metro committed to building four parks in four years. As a result, new nature parks opened in 2008, 2009, and 2010. Similarly, Metro had success meeting their acre purchase goals to support protecting habitat and water quality. Areas were prioritized using scientific surveys to identify specific habitat types that were threatened. This data-based approach shows the potential benefit of setting specific performance targets and then measuring progress.

The underdeveloped performance measurement system could lead to distrust with the public and program partners. Metro intended to do things differently for this bond by:

- Prioritizing equitable access and habitat preservation.
- Engaging community members more robustly and listening to their feedback.
- Demonstrating how equity considerations could be included in parks and nature investments.

Not delivering on commitments could damage relationships with the community and may limit support for future investments in Metro's parks and natural areas.

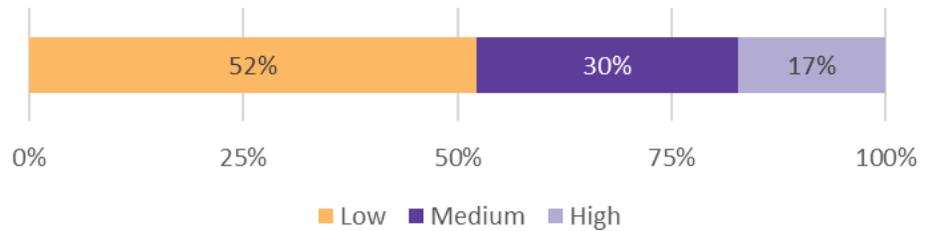
Limitations to access in current portfolio

Land purchased through bond measures presents an opportunity to increase public access. However, the audit found limitations to accessing some of the land. This was partly due to the prioritization of habitat conservation in previous bonds. Our analysis showed the current land portfolio is oriented towards conservation and we found barriers getting to and experiencing some Metro-owned land.

Land oriented towards conservation

Metro’s land purchases have been oriented towards conservation. Memos for each purchase from 2006 onward included a description of the land’s public access potential and a public access rating of low (not likely to offer access), medium (future access possibility), or high (the public will have access). The data showed 17% of acquisitions were ranked as high which indicates that most land purchases were not intended for public access.

Exhibit 8 About 17% of purchases since 2006 were rated high for access potential



Source: Auditor’s Office analysis of Parks and Nature closing memos.

Public access potential may change over time, so the audit also evaluated the way land is currently classified. The analysis showed the largest group of Metro sites are classified as Natural Areas. The primary focus for Natural Areas is conservation rather than public access. There are nearly seven times more Natural Areas than Nature Parks. Land acquisitions over three bonds have predominantly contributed to sites without formal public access. About three times as many purchases have been invested in Natural Areas and Habitat Preserves (\$144 million) as Nature Parks and Recreational Areas (\$53 million).

Exhibit 9 Most of Metro’s sites are Regional Natural Areas



Source: Auditor’s Office analysis of Parks and Nature data.

Difficulties getting to, and experiencing natural areas

Natural Areas make up the largest number of sites and there were barriers to accessing some of them. The primary purpose of these sites is not for recreation, however all of Metro’s land is public and community members are normally permitted to use Natural Areas. There were gaps between community access expectations and what we observed when we visited the following eight Natural Areas:

- Arrow Creek, Multnomah County
- Barton, Clackamas County
- Brown, Washington County
- Gabbert Butte, Multnomah County
- Grant Butte Wetlands, Multnomah County
- Heritage Pine, Washington County
- Holcomb Creek, Washington County
- Richardson Creek, Clackamas County

We compared our observations to what members of the community stated were important.

Exhibit 10 Obstacles to access observed at natural areas

Community access expectation	Obstacles to access
Getting to Sites	
Information availability Virtual platform with site information such as hours of operations, maps, accessibility and amenities	Information not posted on Metro website
Travel Sites are convenient and feasible to travel to	Sites are predominantly accessible by car with limited public transit options; sidewalks can be lacking
Mobility Visitors of all abilities can enter site and move within the site	Challenges to enter and move including a wetland; a steep slope; fences; locked gates; private property and no trespassing signs; agriculture and residential leases
Experience at Sites	
Amenities Infrastructure supports the nature experience	Lack of trails, trails covered by blackberries, lack of formal parking, lack of tables
Signage Signs support feeling welcomed; expectations are clear	Metro signs posted ad hoc
Maintenance of sites Sites are clean and taken care of	Presence of trash and overgrown trails that were not passable

Source: Auditor’s Office analysis of site visits in January 2023, community engagement report, Metro website, travel data, agricultural lease data, 2011 Portfolio Report, and Natural Area data.

These obstacles increased the risk that the access needs expressed by community members may not be met at Natural Areas. Maintained parks were stated by the community as an important component for access. We visited Grant Butte, a Natural Area located in an equity focus area. Equity focus areas have higher concentrations of BIPOC, English language learners, and low-income community members. We observed three piles of trash located nearby two entrances.

Providing information online about certain Natural Areas could be a low-cost way to increase access. In a community engagement session with Black and African American groups, participants stated that a lack of information about parks and outdoor recreational activities was a barrier to use. Metro currently has a practice of not posting information about Natural Areas on its website.

The practice's purpose was to manage potential tradeoffs between public use and other priorities. For example, concern for visitor safety, not enough funding to manage high use at all sites, or the possibility visitors may unknowingly access privately owned land on neighboring properties. Other potential reasons for limiting access include preventing illegal uses, sensitive habitats could be impacted negatively from increased public access, and some land is leased for agricultural uses. However, increasing information about some areas could offer an opportunity to meet community access needs, given the large number of Natural Areas in Metro's portfolio.

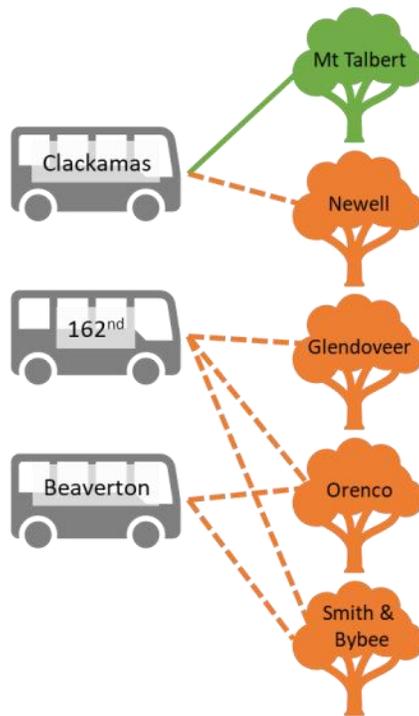
Getting to most parks and recreation areas may require a personal vehicle

The audit also found a barrier to accessing some Recreational Areas and Nature Parks. Recreational Areas and Nature Parks are site classifications intended for public use. We found that these sites may not be easily accessible without a personal vehicle. We used Google Maps to calculate transportation time to Metro's twenty Nature Parks and Recreational Areas from three TriMet stops in equity focus areas:

- Beaverton Transit Center,
- Clackamas Transit Center, and
- the NE 162nd station on the border of Portland and Gresham.

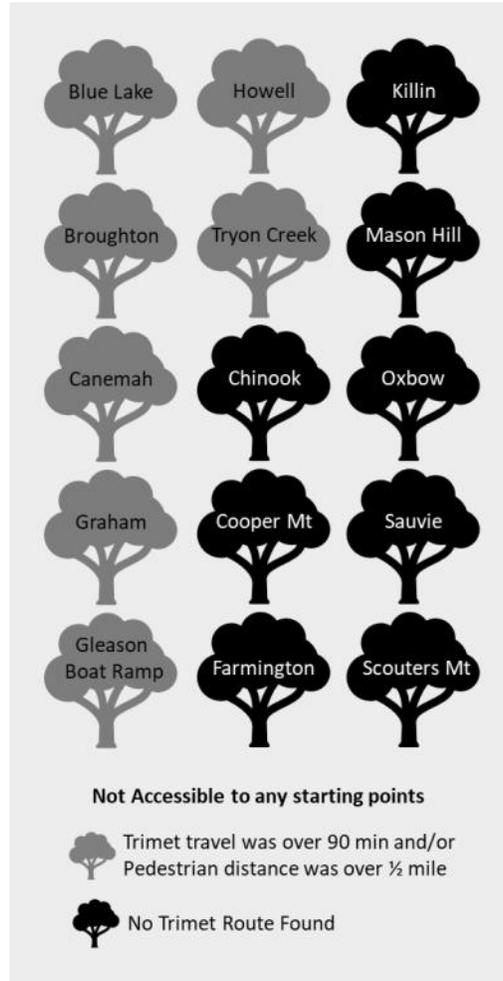
We found that 40% of Recreational Areas and Nature Parks sites could not be accessed from the three public transit starting points. From our three starting points, only one site could be reached using TriMet in an hour or less with a quarter mile or less of walking distance. In comparison, each of the three starting points was within a 30-minute drive of at least 10 of the 20 Recreation Areas or Nature Parks. Five of these sites could be reached by public transportation from the starting points when we increased travel time to 90 minutes and walking distance to half a mile.

Exhibit 11 Five Nature Parks and Recreational Areas can be reached in under 90 minutes via TriMet from selected starting points



Accessible to some starting points

- Trimet travel was 60 min or less and Pedestrian distance was ¼ mile or less
- - - Trimet travel was 90 min or less and Pedestrian distance was ½ mile or less



Not Accessible to any starting points

- Trimet travel was over 90 min and/or Pedestrian distance was over ½ mile
- No Trimet Route Found

Source: Auditor Office travel analysis, Google Maps, as of December 2022.

Travel time and distance are possible indicators of equitable access. A clear definition of equitable access could create a target for success. For example, all homes in nature-deprived areas of the region are within a half mile walk to a park by 2032. A goal like this would lead to specific choices regarding program investments, partnerships with local jurisdictions, and could provide further definition for Metro’s role in the region.

Bond programs have the potential to increase access, but many other priorities exist

Each bond program’s potential to increase access varied. Metro had to balance potentially competing priorities when allocating funding among programs and in deciding how funding would be spent within each program. These competing needs included purchasing land for conservation, taking care of existing sites, and increasing access.

Several of the Bond’s programs had the potential to increase access, but only one program was predominantly focused on creating new access to nature. The bond’s role in increasing access was mainly focused on funding partners rather than investing in increased access within Metro’s land portfolio.

Metro's land investments were less focused on access

The Local Share program provides funds for local park providers to create new sites or increase access at existing sites. Three grant programs, Nature in Neighborhoods, Regional Trails and Large Scale Community Visions provide funding to governments and nonprofits in the region. These programs are likely to invest a portion of available funds to increase nature access.

The two largest Bond programs, Protect and Restore Land and Take Care of Metro Parks, have less emphasis on funding new access opportunities because they are focused on purchasing land and improving existing Metro parks.

Fifty-three percent of bond funds are focused on internal Metro programs and are not primarily focused on investments in new access. Protect and Restore Land focuses on purchasing land for habitat conservation while Take Care of Metro Parks focuses on updating existing Metro sites.

The Protect and Restore Land program purchases land but will not increase formal access without investments in key steps in the development process like master planning, design, and construction. It has taken Metro an average of thirteen years to construct a new park from the time of the first land purchase to completion. This suggests that land purchased with bond funds is unlikely to be converted to formal access during the life of the bond.

While the Take Care of Metro Parks program was designed to build new parks or maintain existing parks, only 3% (\$3.2 million) was planned for park construction. These funds went towards completing two Nature Parks, Newell Creek Canyon and Chehalem Ridge, which were previously Natural Areas. Most of the funding for these parks came from the 2006 bond, grants, and Metro's local operating levy.

The lack of funding for new parks was due to prioritizing investments that meet needs within existing parks. The majority of Take Care of Metro Parks funds, including estimated costs for administration and staffing, are planned for Oxbow and Blue Lake Regional Parks. Most of these investments do not appear to provide additional amenities for users, but will maintain existing amenities and facilities. A planning document noted that Blue Lake Park infrastructure work was desperately needed to meet fire suppression requirements, address the removal of derelict and unsafe structures, and upgrade the sanitary system. These infrastructure updates are important to continue the operations of this park, but may not increase access.

Some of the funding for the Take Care of Metro Parks program could enhance access at existing sites. These include projects to comply with the Americans with Disabilities Act and a renovation of Blue Lake Park. The specific projects that will be funded had not been finalized during the audit.

Metro's strategy to increase access is focused on funding partners

Local Share and three grant programs could support access to varying degrees, but it will depend on what projects are selected for funding. The Local Share program appears to offer the greatest potential to increase access due to its primary function of granting money to 27 jurisdictions in the region. However, this potential may be reduced due to a shift in local park providers toward maintenance instead of new access opportunities.

Local Share projects have been highlighted for their equity focus including projects near affordable housing and low-income communities. Most jurisdictions appeared to include an equity focus area within their boundaries. Of the ten projects that had applied to Local Share at the time of our review, three were projects to build a new park within or near an equity focus area.

However, some recent trends indicate that local jurisdictions may be moving away from new access projects to focus on deferred maintenance. For example, in the 2006 bond, 75% of the City of Portland's Local Share funds were allocated to natural areas and park acquisitions. With the 2019 bond, 31% of the City of Portland's Local Share funds were planned for new access to nature, and 68% for maintaining existing assets. We were told the distribution of 2019 funds may be subject to change.

Nature in Neighborhoods is also expected to increase access, but the primary purpose of the program is habitat protection. Of the 52 past projects, 15 were included in a post-project evaluation. The evaluation stated eight new parks were created through program investments, but it did not list which ones. No capital grant projects have been funded yet from the current Bond, and so it is not yet clear if access will be increased.

The Large Scale Community Visions program has potential to increase access. However, the program contains multiple focuses including potential investments in housing, job creation, or transit. At the time of our analysis, four proposals were being considered but no funding decisions had been made. Project proposals included developing urban green spaces, and one included a large natural area with the potential for the public to use nature trails.

The potential of the Regional Trails program to provide access to nature is complex because of the breadth of goals. Building the regional trails system offers the potential to help people to get to nature. Some of the twelve projects appeared to support an experience directly in nature, such as being along a river or providing a public route to get to nature. But, other projects contained descriptions of their locations in dense, urban areas or along heavily trafficked roads which may not be considered nature by the public.

Improved access will depend on which projects are funded

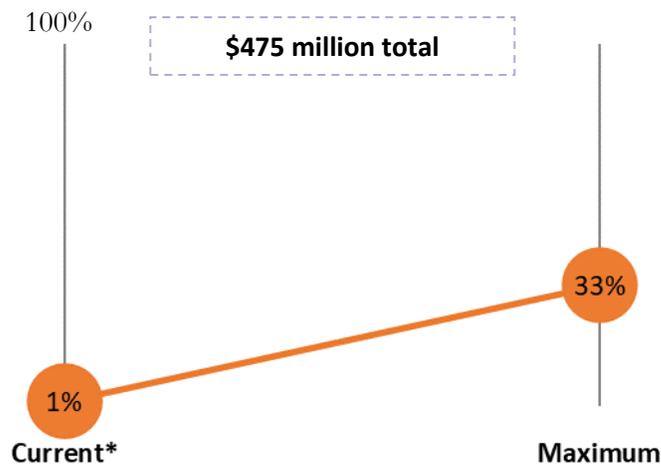
Local Share, Nature in Neighborhoods, and Large Scale Community Visions are the programs that can maximize investments in access. This is due to the fact that the other programs (Regional Trails and Take Care of Metro Parks) have already planned most of their funds, and the Protect and Restore Land program will not increase formal access over the life of the bond.

We calculated possible investments in new parks. The calculation was based on two measures:

- what has been spent so far (current),
- the maximum amount of money that could be spent (maximum).

Current spending was determined by Local Share’s approval of \$3.6 million for a new park with Tualatin Hills Park and Recreation district and the completion of two Nature Parks in the Take Care of Metro Parks program (\$3.3M). The maximum spend calculated available money in Local Share, Nature in Neighborhoods and Large Scale Community Visions. All three of these programs would need to spend all of their available funds on new parks to reach the maximum investment possibility.

Exhibit 12 1% of Bond funds to date have been spent on new parks; 33% is the estimated maximum spending on new parks



Source: Auditor’s Office analysis of Parks and Nature documents

*Current as of 01/23/2023

There are options to increase access

If Metro wanted to have more assurance of increased access, there are strategies it could adopt using current bond funds or through other initiatives in the future. The appropriateness of these strategies will depend on the definition, goals, and measures for access and equitable access. The audit identified four potential options:

- building new nature parks;
- creating alternative land management priorities at some natural areas;
- increasing investments in partner sites; and
- seeking additional resources.

Build new Nature Parks

Metro's Nature Parks are the current model to provide formal nature access to the public. One way Metro could increase access is to invest in the development of Nature Parks. The bond identified Natural Areas with master plans that could be developed into Nature Parks including Burlington Creek Forest Natural Area, East Council Creek Natural Area, Gabbert Butte Natural Area and McCarthy Creek Forest Natural Area.

The two recently created parks cost about \$3-\$5.3 million to construct according to Parks and Nature. Ensuring there is sufficient funding for operations and maintenance will be an important consideration for this strategy. Surplus bond funds could be used for construction. Ongoing operations and maintenance would likely come from the Local Operating Levy.

Consider alternative management practices

Building select amenities at suitable Natural Areas could be an option to improve access without the full cost of building a new park. Other lower-cost options would be to increase maintenance of existing trails at Natural Areas while making site information available online for some of these areas. These options are in line with what BIPOC communities requested in engagement sessions. The combination of increased maintenance with public information could enhance awareness while fostering safe conditions.

Other local parks providers encourage public access without necessarily offering toilets or formal parking. An enhanced Natural Area could include regular maintenance such as picking up trash and maintaining existing trails without building parking or bathroom facilities. Metro could also evaluate the viability of listing select Natural Areas on the Metro website. Natural Areas that have been master planned or identified as having more potential for public access would be logical options since they have already been vetted by department staff for their suitability for public use.

Consider increased investment at partner sites

Early in Metro's conservation work, an approach of purchasing land to be managed in partnership with other parks providers was used. These sites are owned in conjunction with the partner in various proportions, sometimes exclusively by Metro and other times co-owned. This approach could provide access close to home since local parks provider boundaries often include residential areas. Our analysis of partner sites suggested that about 90% of Metro's partner-managed sites had a level of public access including trails and available information on the parks providers' websites.

Design future bonds to make greater investment in new access opportunities

Increased funding for public access could be evaluated for future bonds. The bond's largest program, Protect and Restore Land, is focused on land acquisition. The lack of funds for new Nature Parks in the Take Care of Metro Parks program suggested that it was undersized to address the need for new access and maintenance at existing sites. Metro could evaluate how its land aligns with BIPOC community goals for increased access. A shift away from land acquisition would be in line with some community feedback. The practice of continued land purchases without a public access plan may have previously been a logical strategy to counter trends of rapid development within the region. Today it may no longer suit Metro's equity goals and BIPOC communities' expressed desire for increased access.

Recommendations

To ensure the 2019 Parks and Nature Bond delivers on its commitments, the Parks and Nature department should:

1. Establish specific, measurable and timebound goals for the bond's expected effect on access.
2. Establish specific, measurable and timebound goals for the bond's expected effect on equitable access.
3. Collect data to measure performance for the goals identified in recommendations one and two.
4. Report annually on progress made on bond goals for access and equitable access.
5. Use performance data to periodically evaluate the effectiveness of bond strategies to increase access and equitable access in the region.
6. Document how communities of color, Indigenous communities, people with low incomes and other historically marginalized communities were engaged in bond project planning and selection.

To clarify the long-term vision for Metro's land holdings, the Parks and Nature department should:

7. Update the Parks and Nature System Plan to clarify how access and equitable access will be prioritized among other goals for Metro land such as stabilization, restoration, and habitat conservation.
8. Use community feedback associated with the 2019 bond to evaluate and update the Parks and Nature department's program activities and capital investment priorities.

Scope and methodology

The purpose of our audit was to determine if Metro was prepared to increase access to nature as envisioned in the 2019 Parks and Nature Bond. Our audit objectives were to:

1. Summarize and define access based on information used to develop the bond measure.
2. Determine the current state of access based on the conclusions reached in Objective One.
3. Determine if the bond was structured to increase access as defined in Objective One.
4. Identify potential opportunities to increase access.

To develop our audit objectives, we reviewed laws, policies and procedures, and reports. We reviewed bond documents and proceedings including council sessions, roundtable events, program handbooks, refinements plans and community engagement reports. We interviewed Council members and managers and staff from multiple departments involved with the bond. Those departments included Parks and Nature, Finance and Regulatory Services and the Office of Metro Attorney. We conducted site visits to Parks and Nature sites in October 2022.

To complete our audit objectives, we reviewed bond documents. These included pre-referral documents, community engagement documentation, the bond measure, the 2016 Systems Plan, the 2011 Portfolio report and program refinement plans. We also analyzed data from the Parks and Nature TerraTrak data system. We conducted additional site visits to Natural Areas in January 2023.

To evaluate access we analyzed the purchase closing memos and Parks and Nature data system, TerraTrak for site designation, acres and purchase amounts. We analyzed agricultural lease data, construction timelines and costs for Nature Parks. We completed analysis of public transit accessibility to sites from Washington, Multnomah and Clackamas Counties.

To assess bond programs' alignment with access definitions, we conducted additional site visits. We also analyzed bond program documents, site documents and correspondence with program managers. To identify potential opportunities to increase access, we researched best practices in equitable nature access and analyzed Metro's historical land approaches and the practices of local parks providers.

We conducted this performance audit in accordance with generally accepted government auditing standards. Those standards require that we plan and perform the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for our findings and conclusions based on our audit objectives. We believe that the evidence obtained provides a reasonable basis for our findings and conclusions based on our audit objectives. The audit was included in the FY 2022-23 audit schedule.

Management response



Memo

Date: Friday, June 16, 2023

To: Brian Evans, Metro Auditor

From: Marissa Madrigal, Metro Chief Operating Officer and Jon Blasher, Parks and Nature Director

Subject: 2019 Parks and Nature bond audit

Thank you for the opportunity to respond to the audit of Metro’s 2019 Parks and Nature Bond. The audit’s focus on how bond investments and efforts have increased access to park facilities is timely and an important discussion. We have included an action plan for the audit’s recommendations at the end of this management response and look forward to incorporating the report’s recommendations into our mission to protect clean water, restore fish and wildlife habitat and connect people to nature close to home.

While the report lays out many worthwhile critiques and recommendations, management would like to take this opportunity to strongly state that Metro’s focus on improving water quality and protecting habitat – built through decades of voter-approved investments and conservation, jurisdictional and community partnerships – continues to be not just relevant, but critical to the health and welfare of our entire region.

The ballot title for the 2019 Parks and Nature Bond says it succinctly: “Bonds to protect water quality, fish, wildlife habitat, natural areas.” This is the direction set through the legislation that governs Parks and Nature’s work, outlined and supported in the Park System Plan approved by the Metro Council in 2016, and the department’s 2019 Racial Equity, Diversity and Inclusion Action Plan, and we cannot ignore it.

Metro Parks and Nature is a unique park provider in the region, placing nature and habitat protection at the center of its work. Our ongoing engagement with community members and stakeholders has demonstrated not only a clear desire but an overwhelming mandate to continue protecting the region’s water quality, wildlife habitat and open spaces. The urgency of a changing climate and the pressures on the urban growth boundaries remain critical drivers of this work. The words of the 1992 Metropolitan Greenspaces Master Plan are still very relevant – intentional protection and planning for open space is a vital regional function for Metro, and its Parks and Nature department.

For more than 30 years, Metro Parks and Nature has pursued this mission through a connected system of parks, trails, and natural areas with a continued focus on the long view of supporting the region’s greenspace. The agency has worked hard to uphold the trust and responsibility of the region’s voters, who have supported this mission by approving bond and levy measures six times.

All of Metro’s parks and nature land is open to the public. Natural areas are public land, and the public is welcome to visit them. Most of Metro’s natural areas have informal access. As well, Metro continues to make progress in improving access to regional nature parks and regional recreation areas including with early investments from the 2019 bond, which have moved the needle on new or improved access

to parks and natural areas across the region. These investments include, but are not limited to, opening two new Metro parks that have been welcoming visitors for over a year – Chehalem Ridge and Newell Creek Canyon. Work to complete the Marine Drive Trail, and to advance the development of recreation opportunities in the North Tualatin Mountains demonstrates the ongoing commitment to creating access to Metro sites.

Moreover, the role of bond funding to support local investments in parks, trails and natural areas is proving transformative. The 2019 bond's Local Share program, distributes \$92 million to the region's 27 park providers to invest in local priorities for parks, trails and natural areas. The program has already allocated over \$24 million dollars to 11 projects across the region including new park land acquisition in Gresham and Tualatin. Park directors are proposing local share projects that increase nature access within their own communities in multiple ways. These include protecting land for a future park in a developing neighborhood and updating facilities to allow for increased accessibility within a park. Finally, there is the bond's Large-scale Community Visions Program, which includes funding to provide catalytic investments that increase access to nature for people across greater Portland or improve the resilience of the region's urban natural areas. In its initial phase it has committed funds to facilitate the purchase or development of two new park sites in the urban core of Portland.

Through nearly 30 years of investments like these, people expect Metro to play a specific and unique role of protecting parks and natural areas, one that takes a long view of habitat protection and is complementary to our partners in the region. We depend on these relationships with key partners around the region to protect and connect parks and natural areas. Over the years, the region's local park providers have emphasized the importance of avoiding overlap between the local parks and nature systems and Metro's regional system. Metro works closely with park providers when considering acquisitions of land or trail gaps in their jurisdiction. In addition, we know from community engagement focus groups and surveys that visitors to parks and natural areas across the region do not necessarily distinguish Metro sites from other parks and natural areas across the region. This feedback consistently validates Parks and Nature's unique role in the regional system.

Management agrees that it must also look for ways to ensure access to nature for communities across the region, especially those who have been historically excluded from opportunities to connect with nature. This is a long-standing goal for Parks and Nature and the clear direction of the 2019 bond. There are multiple opportunities to apply the report's insights into ongoing work. Parks and Nature has been working diligently to translate the 2019 Parks and Nature bond legislation's policy and criteria into achievable steps and measurable outcomes. Management believes the best way to implement this policy is through setting goals that benefit a whole community and pursuing them by focusing efforts on specific groups that have not had access to power and decision-making. This has been complex work in uncertain times and has involved evaluation and application of: tribal relationships; community engagement best practices; equitable planning principles; ADA and disability justice practices; strategies to understand and increase COBID participation rate; and workforce equity practices across the region.

Management agrees that it must continue to look for ways to ensure that communities across the region, especially those who have been historically excluded from decision making, have opportunities to connect with nature. Metro Parks and Nature sees the bond efforts, especially those that support other regional park providers, as steady progress toward implementing the promises of the 2019 Bond.

This audit and the recommendations will help management clarify and articulate the dimensions of access across the region's parks and natural areas, going beyond a single metric of supply. This is a topic that is important to partners, community members and the Natural Areas and Capital Program Performance Oversight Committee. Work is underway to develop, refine and test a framework that can evaluate our progress towards meeting the bond criteria, including those focused on access. Management believes this framework will align with many of the actions recommended in this audit.

Management firmly believes the bond's Taking Care of Metro Parks program will substantially increase access to nature by making investments that update existing parks and complete new parks. While page 17 of the audit states this program is for either building new parks or maintaining existing facilities, management believes that the bond measure provides clear guidance from voters that this program area should invest both in updating existing parks and completing new parks. During the development of the bond measure, community members shared that projects that ensure safe experiences for visitors at beloved sites like Oxbow and Blue Lake Park regional parks were critical to their ability to access nature. Figure 6 on page 9 of the audit outlines that key factors for access are safety and site maintenance. Those conditions are at risk or compromised at Blue Lake and Oxbow. Addressing these issues ensures access and makes those parks available for future use. And because these projects are being planned and designed with significant input from Black, Brown and Indigenous communities, these updates will expand access to nature by serving more of our community members.

Management would like to offer one final observation about the mission and role of Metro Parks and Nature as outlined in the Council approved Parks and Nature System Plan. Recommendation 7 suggests that the Parks and Nature System Plan should be updated to add new site access into the prioritization analysis. The department agrees that reviewing the system plan may be warranted to account for the passage of time. However, that review would not change the orientation of Parks and Nature's mission, unless directed by Council.

Recommendation Numbers 1-4

1. Establish specific, measurable and timebound goals for the bond's expected effect on access.
2. Establish specific, measurable and timebound goals for the bond's expected effect on equitable access.
3. Collect data to measure performance for the goals identified in recommendations one and two.
4. Report annually on progress made on goals for access and equitable access.

Response: Management agrees with these recommendations and believes that they need to be considered and advanced as one block through the setting of overarching goals that highlight progress for specific groups that are situated outside of traditional avenues of access to power and decision making.

Proposed plan: Parks and Nature is broadening existing departmental reporting to build capacity to report on progress in meeting the bond criteria including access. Doing so involves two actions: one, mapping of bond investments over time as a connected system; two, the development of a framework that can measure and articulate the long-term impact of bond investments over the life of the bond. Management believes this aligns with many of the actions recommended in this audit.

Among other outcomes, this framework articulates long-term outcomes of bond investments on residents feeling welcome at Metro parks and natural areas, accessing governmental decision-making pathways and using an interconnected regional system of trails.

The department has developed this framework by piloting data collection through interviews and surveys

of Metro partners and community members engaged in bond investments and activities, Parks and Nature will further clarify the definition of access for bond investments through refining short term and intermediate benchmarks that can help mark progress. In addition, beginning as early as fiscal year 2024, Parks and Nature will ask partners that receive Local Share dollars as well as grants to report annually on how bond-funded investments have met bond goals around meaningful engagement, accessibility within sites and ensuring bond investments reflect community priorities.

Parks and Nature will ensure that regular reporting through the parks and nature annual report and the Natural Areas and Capital Program Performance Oversight Committee's annual report to the Metro Council includes updates on these short and intermediate goals around accessibility.

Timeline: December 31, 2024

Recommendation Number 5: Use performance data to periodically evaluate the effectiveness of strategies to increase access and equitable access in the region.

Response: Management agrees with this recommendation and believes setting overarching goals that highlight progress for specific groups that are outside of traditional avenues of access to power and decision making is the most effective approach to increase access in the region.

Proposed plan: Evaluating the effectiveness of the department's strategies to increase access requires understanding outcomes and impacts of investments made and activities completed through spatial analysis, online surveys, community focus groups and site tours and visits, some of which are currently underway. Moving forward, Parks and Nature will explore the feasibility of deploying broader survey tools to collect information from residents across the region about experiences at and accessing the region's parks and natural areas.

By December 31, 2024, Parks and Nature will develop a plan to identify specific focal areas and methods for collecting and analyzing this performance data, shaped by factors such as staff capacity, information collected through engagements with community members on bond and levy programs. Starting in winter 2024, Parks and Nature will implement this plan, acknowledging that collecting and analyzing this performance data in a meaningful way will need to occur over several years.

Timeline: December 31, 2024

Recommendation Number 6: Document how communities of color, Indigenous communities, people with low incomes and other historically marginalized communities were engaged in project planning and selection.

Response: Management agrees with this recommendation.

Proposed plan: Parks and Nature has worked to build trust and strengthen relationships with communities of color, Indigenous communities and other historically marginalized communities by engaging them in development and implementation of bond programs and selection of specific projects. Parks and Nature summarizes feedback received from community members and shares it back with community to show how it has been used to shape programs and projects. As engagement continues in 2023 for the Nature in Neighborhoods community choice grants and

project improvements at Blue Lake Park and Lone Fir Cultural Heritage and Healing Garden, Parks and Nature will share new summaries of how community feedback has shaped projects by December 31, 2024.

In addition, in order to receive bond local share and grant funds, agencies are required to articulate how community feedback has and will continue to shape project identification, selection and development.

Timeline: December 31, 2024

Recommendation Number 7: Update the Parks and Nature System Plan to clarify how access and equitable access will be prioritized in conjunction with other goals such as stabilization, restoration, and land acquisition for habitat conservation.

Response: Management takes this recommendation under advisement as it prompts questions for Council policy direction.

Proposed plan: In alignment with language in the Parks and Nature System Plan to review it every five to seven years, Parks and Nature will examine opportunities to update elements of the System Plan and other guiding plans to identify what additional analysis, planning or updating is needed to address or clarify our three-pronged role in the region. Given the focus of this audit and feedback from Council and community members, Parks and Nature will seek direction from Council and the COO's office as part of this scoping process about whether and how the Council wants to consider questions about Metro's focus and role in the Parks and Nature regional system.

Timeline: By December 2024, Parks and Nature will develop a work plan that considers the need and feasibility of any updates the System Plan. Parks and Nature anticipates that the work to update the system plan to reflect Council direction, updated needs, community priorities and Council direction, will take an additional two years.

Recommendation Number 8: Use community feedback associated with the 2019 bond to evaluate and update the Parks and Nature department's program activities and capital investment priorities.

Response: Management agrees with this recommendation.

Proposed plan: Parks and Nature has been using community feedback solicited through bond development and implementation to inform other aspects of the department's work in efforts to avoid repeatedly asking community the same questions. Moving forward in summer 2023, Parks and Nature will continue to use information collected to date as well as feedback from upcoming community engagement to help inform anticipated updates to the Parks and Nature system plan and prioritize future capital investments.

Timeline: This effort is underway and ongoing.



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