

# ✓ MAKING GOOD

2011

*Tualatin Hills Park & Recreation District*  
**2<sup>ND</sup> Report on Bond Measure Progress**

**BOND OVERSIGHT COMMITTEE**





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*“You can discover more about a person in an hour of play than in a year of conversation.”*

**PLATO**

February 2012  
Tualatin Hills Park & Recreation District

**On the cover: Rock Creek Trail winds past Bethany Meadows Park, popularly known as “Pirate Park.”**

# AN UNCOMMON BOND



Multipurpose athletic fields with synthetic turf will be among those added to the Beaverton area, thanks to the Bond Measure.

In 2008, the Tualatin Hills Park & Recreation District, with input from a Bond Task Force, developed a \$100,000,000 Bond Measure to fund a recommended list of land acquisitions and projects. Bond funds were to be used for present and future needs throughout the district, and included six major components: Park Additions and Upgrades, Natural Area Preservation, Trail Expansions, Youth Athletic Field Additions, Building Expansions and Facility Replacements and Upgrades.

**B**ond Measure 34-156 “Bonds to Preserve Natural Areas, Water, Improve Parks, Create Trails” was approved by a public vote on November 4, 2008. Sale of the bonds was accomplished in two phases. Bonds totaling \$58,500,000 were issued in April 2009 at an effective interest rate of 4.19 percent, and the balance of the bonds with a face amount of \$40,060,000 was sold on September 16, 2011 at an effective interest rate of 3.25 percent. Projected costs to district taxpayers are discussed on THPRD’s website at [www.thprd.org/news/news.cfm?id=1272](http://www.thprd.org/news/news.cfm?id=1272).

The Bond Measure included provisions for a citizen oversight committee and required yearly independent financial audits. Fulfilling this promise, THPRD’s Board of Directors established the Citizen Bond Oversight Committee on December 8, 2008 by Resolution No. 2008-15. The resolution states “The purpose and authority of the Committee is to ensure that the THPRD Parks Bond Capital Program meets the objectives of the Bond Measure and funds are expended as promised, with a focus on overall delivery of Bond Measure obligations and “not the details of specific projects or activities.” The Committee was directed to report annually to the Board and the public

The Tualatin Hills Park & Recreation District (THPRD) is the largest special park district in Oregon. It spans about **50** square miles and serves more than **220,000** residents in northeastern Washington County. THPRD owns or manages more than **90** park sites with active recreational amenities, **1,400** acres of natural areas spread across **162** sites, and **60** miles of trails.

## AN UNCOMMON BOND

regarding conformance with stated Bond Measure objectives; and, to make recommendations, if any, for improving the Bond Program efficiency, administration or performance. The Committee does not design projects, approve project designs, or supervise any THPRD activities. Committee recommendations must have the support of a majority of Committee members.

The Board solicited applications and selected members, and the Committee met initially in May 2009. The Committee's first report was delivered to the Board in November 2010, and is available in its entirety on the THPRD website, at [www.thprd.org/bondprojects/home.cfm](http://www.thprd.org/bondprojects/home.cfm). The first Committee report discussed progress through June 30, 2010, focused on:

- ✓ General Objectives and Strategies to Implement the Bond Measure
- ✓ Promises Made, Examined by Project Category
- ✓ Accomplishments
- ✓ Recommendations
- ✓ Looking Ahead

Recommendations were made regarding comprehensive project reporting, tracking project staff time, development of performance measures and strengthening communications to increase public understanding of Bond Measure progress.

This is the second annual report of the Tualatin Hills Park & Recreation District Citizen Bond Oversight Committee. The Committee meets quarterly with staff, who present reports on bond project status, finance, and events of consequence such as new land acquisitions. The reports include explanations of meaningful deviations from the project schedules, shifts in project budgets or changes in project scope.



Users of the Conestoga Recreation & Aquatic Center can look forward to many bond-funded improvements in 2012, including the district's first-ever splash pad.

*“The future belongs to those who give the next generation reason for hope.”*

**PIERRE TEILHARD  
DE CHARDIN**



# FINANCIAL SUMMARY

This report covers the time period from July 2010 through June 2011, the most recent budget year for THPRD. The table summarizes overall use of Bond Program funds to date.

## Adjusted Bond Program Allocation Column (see table)

There are three primary reasons for the changes in this column. They are: Project Grouping Adjustments to the Parks and Youth Athletic Fields expenditure categories to allow management and contractual development of these projects to move forward in tandem, other Project Management Adjustments, and Interest Earned.

## Project Grouping Adjustments

Specific adjustments:

*Increases* of \$6,650,800 in the New/Redeveloped Neighborhood and Community Parks category and \$60,000 in the Natural Area Restoration expenditure category.

*Reductions* of \$6,000,000 in the Youth Athletic Fields category, \$95,000 in the Trails and Linear Parks category, \$90,800 in the Deferred and Park Maintenance and Replacements category, and \$525,000 in the Facilities Rehabilitation, Expansion and Improvement category.

## FY2009-2011 BOND PROGRAM FINANCIAL SUMMARY

(\$ in thousands)

Purpose & Promises Made	Initial Bond Program Allocation	Adjusted Bond Program Allocation	Expended Thru 6.30.2011	Balance as of 6.30.2011
<b>LAND ACQUISITION</b>				
New Neighborhood Parks	\$9,000.0	\$9,086.3	\$3,741.5	\$5,344.8
New Community Park	\$10,000.0	\$10,096.8	\$8,094.0	\$2,002.8
Natural Area Preservation	\$8,400.0	\$8,481.4	\$205.8	\$8,275.6
New Linear Park & Trail	\$1,200.0	\$1,211.6	\$688.8	\$522.8
New Community Center SW	\$5,000.0	\$5,048.5	\$590.0	\$4,458.5
<b>Total</b>	<b>\$33,600.0</b>	<b>\$33,924.6</b>	<b>\$13,320.1</b>	<b>\$20,604.5</b>
<b>PARKS AND YOUTH ATHLETIC FIELDS</b>				
New Neighborhood Park Development	\$3,750.0	\$4,930.9	\$166.7	\$4,764.2
Renovate/Redevelop Neighborhood Parks	\$3,000.0	\$3,763.2	\$276.6	\$3,486.6
Develop New Community Park	\$5,000.0	\$7,786.2	\$2.1	\$7,784.1
Renovate/Redevelop Community Parks	\$7,000.0	\$9,886.9	\$563.9	\$9,323.0
Youth Athletic Field Development	\$5,000.0	\$3,114.0	\$458.2	\$2,655.8
Synthetic Field Development	\$4,000.0	\$0.0	\$0.0	\$0.0
Outdoor Splash Pad	\$525.0	\$0.0	\$0.0	\$0.0
<b>Total</b>	<b>\$28,275.0</b>	<b>\$29,481.2</b>	<b>\$1,467.5</b>	<b>\$28,013.7</b>
<b>NATURAL AREA RESTORATION</b>				
	\$3,600.0	\$3,799.2	\$137.5	\$3,661.7
<b>NEW LINEAR PARK &amp; TRAIL DEVELOPMENT</b>				
	\$14,745.0	\$15,201.9	\$1,872.5	\$13,329.4
<b>DEFERRED PARK MAINT. REPLACEMENTS</b>				
	\$1,500.0	\$1,459.5	\$1,168.4	\$291.1
<b>FACILITIES REHAB, EXPANSION &amp; IMPROVE.</b>				
Facility Rehabilitation	\$6,500.0	\$6,282.2	\$700.6	\$5,581.6
Facility Expansion & Improvements	\$7,550.0	\$8,290.2	\$1,970.8	\$6,319.4
<b>Total</b>	<b>\$14,050.0</b>	<b>\$14,572.4</b>	<b>\$2,671.4</b>	<b>\$11,901.0</b>
<b>ADA/ACCESS IMPROVEMENTS</b>				
	\$1,000.0	\$1,037.8	\$59.5	\$978.3
<b>BOND ISSUANCE COSTS &amp; PROJECT MGMT</b>				
	\$3,230.0	\$1,450.0	\$85.4	\$1,364.6
<b>GRAND TOTAL</b>	<b>\$100,000.0</b>	<b>\$100,926.6</b>	<b>\$20,782.3</b>	<b>\$80,144.3</b>

# FINANCIAL SUMMARY

The close relationship between park and athletic field development created a need to simplify the management and funding of these facilities contemplated by the 2008 Bond Measure. Consequently, some Park Improvement projects and related Youth Athletic Field projects have been merged from a management perspective. After discussion with THPRD staff, New/ Redeveloped Community and Neighborhood Parks and Youth Athletic Fields were consolidated into one expenditure category, Parks and Youth Athletic fields. The Committee will continue to track total expenditures for Youth Athletic Fields relative to the initial Bond Program allocation.

## Project Management Adjustments

Based on an accounting policy choice by staff and the Board, \$1,780,000 was transferred from Bond Issuance Costs and Project Management and distributed to all projects except for Land Acquisition. This transfer was made to achieve proper accounting of these costs whereby they are included in the project costs and capitalized as part of the cost of the asset. Through June 30, 2011, \$665,000 had been expended on project management for all bond projects.

## Interest Earned

Through June 30, 2011, a total of \$926,500 of earned interest on invested bond funds had been proportionately redistributed to all projects except for the Bond Issuance Costs and Project Management expenditure category.

## Other Funding

Through June 30, 2011, other funding sources had been used to provide additional revenue for four projects which are not included in the Financial Summary.

» *Camille Park*: Local Government Grant Program award of \$70,000 towards installation of play equipment, a picnic pavilion and site furnishings;

» *Schiffler Park*: Land/Water Conservation Fund award of \$40,000, and \$50,000 of System Development Charge funds to remove an old picnic pavilion and replace it with a 30-foot by 40-foot structure;

» *Winkelman Park Athletic Field*: The Board authorized up to \$400,000 in System Development Charge funds to be expended for additional site amenities such as a dog park and parking lot;

» Cobb property acquisition for a neighborhood park site in the SE quadrant of the district (SE corner of Sexton Mtn. Drive and Murray Blvd.): \$300,000 of City of Beaverton 2006 Metro Bond Measure local share funds to assist in acquisition.

Conestoga Recreation  
& Aquatic Center



# ORGANIZATION + POLICIES



All bond project work is carefully managed in accordance with priorities set by the THPRD Board of Directors.

During 2009 and 2010, the THPRD Board and staff engaged in intensive planning and structuring of Bond Measure projects, establishing priorities and developing financial and operational principles to guide the staffing, contracting and public communications needed to accomplish bond objectives.

The Board established fundamental guidelines to be followed, while additional staffing needs were identified and a list of appropriate contractors was created. Some of the decisions made in this process, as discussed in the Committee's 2010 report, were:

#### ✔ Work accomplished in parallel

The combination of a variety of complex bond projects and a federal tax law requiring that 85 percent of the bond proceeds are expected to be spent within the first three years following bond sale necessitated a planned strategy by THPRD to implement projects in parallel.

#### ✔ Prompt land acquisition efforts

Land acquisition efforts were a high priority and were initiated immediately to use funds promptly, to address statutory requirements for timely bond expenditures. As discussed later, for various reasons land acquisitions have been few to date, resulting in somewhat slower than anticipated use of bond funds for this purpose.

#### ✔ Financial management policies

THPRD, in collaboration with the Committee, developed policies for managing various project funding changes or adjustments to guide accounting for projects and project categories.

#### ✔ Geographical distribution

THPRD adopted the general principle of distributing land acquisition and other projects throughout the district as described by and consistent with the Bond Measure informational materials. Where individual projects are not targeted to specific locations (such as Natural Area Restoration), the Committee continues to monitor for appropriate distribution throughout the district.

#### ✔ Sustainable practices

THPRD has established benchmarks and targets for its carbon footprint and reviews bond project designs for impact on this footprint. THPRD developed a financial and sustainability costing model, resulting in a new program which called

## ORGANIZATION + POLICIES



Signage has been placed at project sites throughout the district as part of THPRD's public education efforts.

for the project planning staff to develop sustainable material standards for construction projects.

### ✓ ADA accessibility

THPRD's Comprehensive Plan calls on THPRD to "ensure access to Park District facilities for people with disabilities that is consistent with the Americans With Disabilities Act." In addition to bond projects specifically focused on ADA access improvements at certain facilities, THPRD is incorporating ADA accessibility into bond projects wherever possible.

### ✓ Wetland mitigation

Much of THPRD's property is located along creek corridors, wetlands or other low-lying areas. Development often causes negative impacts to these sensitive areas, and federal, state, and local law requires such impacts to be mitigated. THPRD fully complies with these regulations, but compliance can result in schedule delays. This is discussed later in this report in more detail.

### ✓ Permitting and inter-agency complications

Construction in parks or restoration work in natural areas often uncovers unforeseen regulatory issues that require analysis, special permits, or inter-governmental cooperation before projects can proceed and be completed. Staff manages these complexities, but schedules are often revised in response.

### ✓ Public communication and involvement

THPRD invests some administrative bond funds in its communications program, to let patrons know when they are seeing a bond project in progress or using a facility built by a bond project. THPRD produces brochures and informational materials about bond projects, and posts very visible signs at facilities when projects are under way, and when completed. Web information is provided to educate the public about progress on bond projects. Special events, community presentations, and news media outreach are also used to communicate with the public.

# WORKS IN PROGRESS



THPRD moved from preliminary planning into implementation of various projects In the last half of 2010 and the first six months of 2011. Some projects and acquisitions have been completed, others are under way, and still others have seen schedule delays, scope changes, or seasonal schedule adjustments. The sections that follow describe the accomplishments and challenges of this ambitious Bond Program in its third year of activity, and discuss activity in each project category.

The most significant land acquisition to date is the 23-acre Teufel property in the Cedar Mill area. It will eventually become a new community park.

## LAND Acquisitions



Land acquisitions proposed in the Bond Measure involved five categories: New Neighborhood Parks, a new Community Park for the NE quadrant of the district, a Community Center for the SW quadrant, Natural Areas, and Linear Parks and Trails. In practice, there has been some overlap in these areas. Total proposed land acquisition cost was \$33,600,000, all from the first bond sale installment. Estimated land acquisition costs were:

- » Parks and Community Center: \$500,000 per acre;
- » Natural Areas: \$10,000 per acre;
- » Linear Parks and Trails: \$150,000 per mile.

Costs include the property purchase price, consultant costs for appraisers, appraisal review, environmental review, title and other closing costs, removal of debris, existing structures or hazards and the hourly rate charged by the land acquisition specialists.

It is THPRD policy to offer the property owner no more than the appraised market value unless there are significant reasons for a higher offer. Appraisals are made by a member of the Appraisal Institute and then reviewed by a second certified appraiser.



This Bethany-area land acquisition along NW 174th Avenue will be converted to a natural area and trailhead.

**BOND-FUNDED LAND ACQUISITION COSTS**

As of June 30, 2011

Category	Initial Budget	Spent
New Community Park	\$10,000,000	\$8,094,046
Community Center	\$5,000,000	\$589,963
Six New Neighborhood Parks	\$9,000,000	\$3,741,467
Natural Areas	\$8,400,000	\$205,845
Linear Parks and Trails	\$1,200,000	\$688,449
<b>TOTAL</b>	<b>\$33,600,000</b>	<b>\$13,314,270</b>



Douglas spiraea

The Board made a strategic decision to focus on park land acquisition first because of the need to buy large parcels of buildable land otherwise suitable for immediate urban development, as opposed to land suitable for natural area restoration and preservation or trails, which would be less likely to be immediately buildable or developable due to topographical or environmental restrictions.

Properties acquired for new parks and a community center will not be developed from bond proceeds. Timing for completion and development of these properties is indefinite. Bond proceeds are intended to provide for development of some, but not all, areas acquired for trails and linear parks and are intended to provide for restoration of many of the areas acquired for natural area preservation.

**Park Land Acquisition**

THPRD planned to acquire sites for a new community park in the NE quadrant of the district, at an estimated cost of \$500,000 per acre; six new neighborhood parks, at least one in each quadrant of the district, each one at an assumed size of three acres and a cost of \$500,000 per acre; and one site for a new community center and recreation facility in the SW quadrant at an estimated cost of \$500,000 per acre.

As of June 30, 2011, land purchases had closed for the new NE community park (Teufel property, \$8,090,946 for 23 acres, \$348,000 per acre), and sites for neighborhood parks in the SE and SW quadrants at acquisition costs to THPRD of \$2,555,536 (for 8.66 acres) and \$1,049,158 (for 6.67 acres), respectively. The average price for neighborhood parks was \$235,140 per acre, less than one-half the original estimates, but the property sizes were larger than the original target. As there is some risk of over-spending in this category, the Committee will continue monitoring this category closely.

## Subsequent Events

At its June 20, 2011 meeting, the Board authorized acquisition of a property in the North Bethany area for part of a future neighborhood park to serve that area, using bond funds designated for acquisition of a neighborhood park as well as Metro local share funds. That land acquisition closed on September 1, 2011. The property is 7.59 acres on the east side of Kaiser Road in an area designated in the Washington County North Bethany Concept Plan for a future community park. The property was acquired for \$2,428,000 (\$320,000 per acre), of which \$850,000 came from THPRD's local share of Metro bond funds.

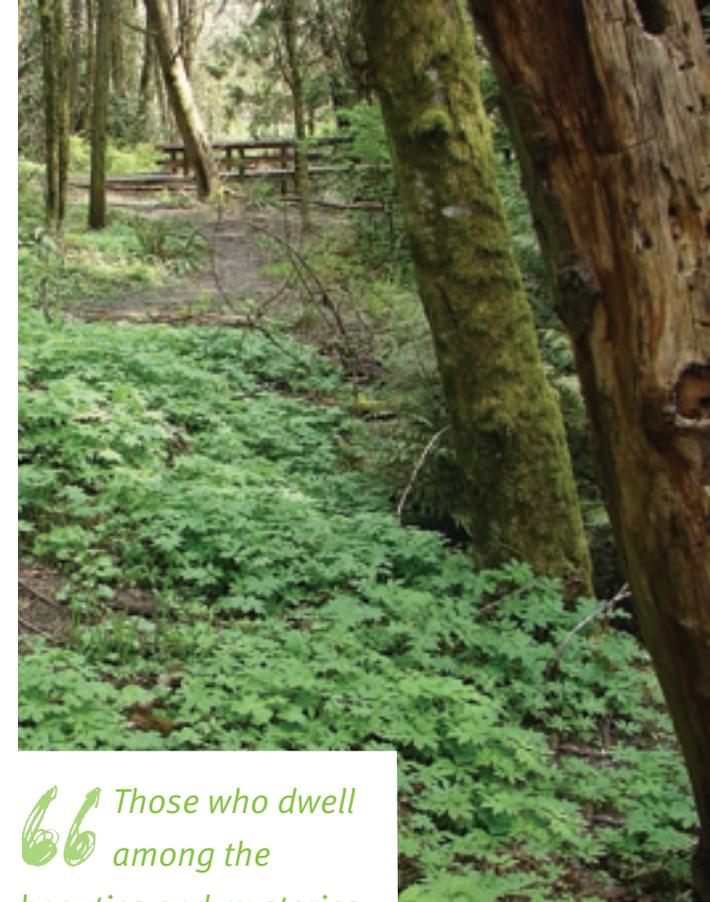
At its August 8, 2011 meeting, the Board approved the acquisition of two properties for a new neighborhood park in the NE quadrant of the District. Staff continues to pursue active negotiations for properties in the NE, NW, and SW quadrants.

Some bond funds have been spent toward establishing a community center in the SW quadrant. THPRD acquired a property south of the Tualatin Valley Highway which would allow needed access to a larger property which THPRD is still negotiating to buy. The property acquired was being actively marketed and staff felt it might be lost to another buyer if they didn't act. Negotiations are continuing on the larger parcel and it is possible that this larger property will not be acquired. In that event it is intended to sell the property already acquired, with proceeds going back into the bond fund for other acquisitions.

## Land Acquisitions for Natural Areas and Linear Parks and Trails

As of June 30, 2011, \$205,845 of a budgeted \$8,400,000 bond funds had been spent for natural area land acquisition. These fit into both the natural area and trail expenditure categories but also involved park sites. Such overlapping may or may not occur in the future, depending on the characteristics of each specific parcel. Sites acquired for other purposes along with natural areas include the 114th Street property discussed below, the Teufel property (NE community park site), the Sterling Savings site (SW neighborhood park site), and the Nguyen property (NW trailhead site). Issues raised by such acquisitions are discussed in the Summary Comments, Recommendations, Future Work section of this report.

On April 14, 2011, THPRD acquired a vacant 0.76-acre site adjacent to 110 NW 114th Avenue for \$340,000 (the appraised value). This property was being actively marketed and would likely have been acquired for residential development. This wooded upland parcel has value as a natural area and also closes a gap in the corridor for the Cedar Mill Creek Community Trail. The cost was allocated equally between the Linear Parks/Trails and the Natural Areas categories and the property is next to one also owned by THPRD overlooking a pond on Johnson Creek. Land to the west of the site across 114th has been improved with a nature trail by Polygon Northwest as part of its Timberland project. This trail will soon be given to THPRD to add to the Cedar Mill Creek Trail. When funding becomes available, it is anticipated that the trail will be continued through this parcel to connect to Foege Park.



*“Those who dwell among the beauties and mysteries of the earth are never alone or weary of life.”*

**RACHEL CARSON**

Natural areas like this improve air and water quality for humans and create habitat for wildlife.

## WORKS IN PROGRESS

On April 26, 2011, THPRD acquired, for \$60,000, a 10-foot-wide trail easement over a portion of a developed single-family residential lot located along the east side of SW 150th Avenue and adjacent to the west side of Roy Dancer Park. THPRD plans to develop a soft-surface trail on this easement to provide more convenient pedestrian access to Roy Dancer Park for residents of neighborhoods to the west and north of the park including the Four Seasons neighborhood. Trail development will occur in conjunction with development of the park, presently scheduled for 2013.

### Criteria for Natural Areas Land Acquisition

Based on the THPRD Natural Resources Management Plan, and according to the THPRD Natural Resources Department, the following criteria guide acquisition of natural areas using bond funds. All criteria need not be met for a particular acquisition:

#### Key reasons to acquire property

- » Connectivity to other natural areas
- » Rare plant/animal communities
- » High quality habitat or high restoration potential
- » Possibility of patron access/education
- » Area large enough to sustain healthy plant/animal populations

#### Reasons not to acquire property

- » The property is unlikely to change in condition whether THPRD owns it or not (example: many narrow riparian corridors that are off limits to development).
- » THPRD has limited ability to maintain it (example: covered with highly invasive plants, extremely steep, limited access, including landlocked properties).
- » Unstable slope/soil conditions within site
- » Potential negative impact to neighboring properties (water, tree, or soil issues)
- » Contamination from past use that is not reasonable to clean up

### General Observations About Land Acquisition

- » Use of bond funds for property acquisition has been slower than originally anticipated, although the pace of acquisitions has recently increased. This should be further improved by THPRD's hiring of an additional part-time land acquisition specialist.
- » Costs per acre for neighborhood parks and the community park have been substantially lower than the original assumptions; however, some of the sites acquired for neighborhood parks have been larger than originally assumed. This has created a potential shortfall in funds for further neighborhood park acquisitions.

» The Board has a general practice of acquiring property from owners voluntarily willing to sell their property to THPRD. The pace of acquisitions and the size of the parcels available are therefore controlled by the individual decisions of property owners. These are factors which THPRD cannot predict or control.

» The current economic situation has caused substantial decreases in the price per acre paid for land. In many cases owners are unwilling to sell at current prices, anticipating higher prices in the future. On the other hand, some foreclosed properties are available from lenders, who generally are more willing to sell now.

» THPRD initially concentrated its efforts on acquisition of park sites, and the majority of those acquisitions have been completed.

» Acquisition of land for trails and natural area preservation has progressed more slowly.

» Acquisition of easements for trails, which generally are not expensive, has been pursued actively. These easements are often located on utility rights-of-way, and it takes time to work through the various legal requirements, including careful definition of acquisition areas and permissible uses.

» Purchase of parcels allocated both to trails and natural areas has made it difficult to determine if the purchase price was above or below the average budgeted price for that category.

## Community & Neighborhood **PARKS** & Youth Athletic Fields



The THPRD standard for a neighborhood park is about three acres. The target for community parks is between 10 and 25 acres. Park amenities depend on the size of the site, but community parks usually offer larger facilities such as sports fields, sheltered group picnic areas, on-site parking and restrooms.

In some cases, funds allocated to Youth Athletic Fields have been combined for efficiency with funds allocated to Community and Neighborhood Parks. Careful monitoring is necessary to track the Parks and Youth Athletic Fields expenditure categories to ensure consistency with Bond Measure commitments.



These “logs” are part of a nature-themed active space at redeveloped Camille Park, due for completion in 2012.



**Just ask the children: A popular amenity of any neighborhood park development or redevelopment is new play equipment.**

### **New Neighborhood Park Development**

The Bond Program goal is to construct five new neighborhood parks. AM Kennedy and Barsotti Parks include funding (\$500,000 each) for a youth athletic field. Construction is expected to be completed on AM Kennedy Park during the last quarter of calendar year (CY) 2012, 4th quarter of 2012 for Hansen Ridge (formerly Kaiser Ridge), CY2014 for Barsotti, and CY2015 for Roy Dancer and Roger Tilbury Parks.

### **Renovate/Redevelop Neighborhood Parks**

The Bond Program goal is to renovate or redevelop five parks. Camille Park is ahead of schedule and should be completed in early 2012. Pioneer Park, including bridge replacement, and Vista Brook Park should be completed in 2012. Cedar Mill Park (including trail) is scheduled for construction in

2013 and Somerset West Park is scheduled for construction in 2014. Funding (\$500,000) has been transferred to Cedar Mill Park for a new youth athletic field.

### **New Community Park Development**

SW Community Park is scheduled to begin construction in CY2015 and be completed in CY2016. Funding has been transferred to this park for both a regular youth athletic field (\$500,000) and a synthetic field (\$2,000,000).

### **Renovate and Redevelop Community Parks**

Construction will begin on Schiffler Park in spring 2012. Cedar Hills Park is scheduled to begin construction in CY2014. The Cedar Hills Park project includes a new synthetic athletic field (\$2,000,000) and a splash pad (\$525,000).

## WORKS IN PROGRESS

Elected officials and other dignitaries dedicate newly created Meadow Way Park in south Beaverton in August 2011. The park features a youth athletic field.



*“Never doubt that a small, group of thoughtful, committed citizens can change the world. Indeed, it is the only thing that ever has.”*

**MARGARET MEAD**

### Meadow Way Park

This park has been completed. The athletic field for this park was completed under budget by a tentative amount of \$113,000.

### Winkelman Park

The Winkelman athletic field is scheduled for construction in CY2012. Current cost estimates for this park exceed the current budget by \$833,000. The THPRD Board has approved supplementing this project with up to \$400,000 from its System Development Charge fund because of additional site amenities not included in early planning efforts. After subtracting this additional commitment, Winkelman Park remains \$433,000 over budget. This construction cost increase is attributable to more refined construction quantities and costs, greater costs for earthwork, additions of a waterline, path and trail work, higher quality fencing, site furnishings, a dog park and under drainage for the athletic field.

### Youth Athletic Fields in Other Park Quadrants

A potential site for a new field in the NE quadrant of the district has been identified. If acquired, construction is scheduled to begin in CY2013. New fields in the NW, SW and SE quadrants are scheduled for construction in CY2014 for NW, CY2016 for SW and CY2015 for SE. Adjusted available funding for the six remaining fields in this category (including Meadow Way and Winkelman Parks noted above) is \$3,114,000. Through June 30, 2011, \$458,200 (14.7 percent) had been spent in this development category.

*“In every walk with nature one receives far more than he seeks.”*

**JOHN MUIR**





Acquisition and preservation of natural areas will provide local residents with increased opportunities for wildlife viewing.

## NATURAL Area Land Acquisition & Restoration Projects



Restoration projects financed by the Bond Program are focused primarily on removal of invasive non-native plants and include efforts to promote wildlife habitat

with native plants and other wildlife enhancement techniques. The Natural Resources & Trails Management Department has employees who work both on bond projects and projects not funded by the Bond Measure. Some work is contracted out through a request for bid (RFB) process.

Although this department has achieved some significant progress on certain specific projects, overall, progress has been slow in achieving the goals promised in the Bond Measure for Natural Area Restoration and Land Acquisition for Natural Areas.

» The 2008 Bond Measure materials indicated to voters that \$3,600,000 would be spent on Natural Area Restoration. To date only \$137,465 has been spent.

» The 2008 Bond Measure materials indicated to voters that \$8,400,000 would be spent for Land Acquisition of Natural Areas. To date only \$205,845 has been spent.

As of June 30, 2011, none of the Natural Area Restoration bond projects have been completed.

### Progress and Delays

The following is the schedule status for Natural Area Restoration projects as of June 30, 2011:

**Cedar Mill Park, Kaiser Ridge Park, Pioneer Park, Fanno Creek project**—adjusted; plans not yet scheduled to start

**Vista Brook Park, Greenway Park/Koll Center**—adjusted; pushed back one year

**Murrayhill Park**—adjusted; extended for second planting in early 2012

**Winkelman Park**—project accelerated to coincide with the athletic field project

**Lowami Hart Woods, Jenkins Estate, Allenbach Acres**—adjusted; delayed



## WORKS IN PROGRESS



The bond-funded boardwalk on the Old Wagon Trail at the Tualatin Hills Nature Park was completed in late 2010.

Newly acquired properties: Since natural area acquisition has been slower than anticipated, no funds have been expended for restoration of new properties.

Most Natural Area Restoration projects are estimated to take five years to complete. Project schedules include project preparation (planning), design of site, seasonal delays, planting, establishment of plants, establishing an interpretive sign network, and monitoring for success, which includes taking care of plants and weeds to ensure long-term survival for up to three years after initial planting.

When delays to scheduled projects have occurred, they have most frequently been due to adjustments required for coordination with other projects and other departments, requirements imposed by other government agencies, or changes requested by the public or the Board.

## TRAILS & Linear Park Projects



Nine Trail and Linear Park projects have been identified for planning and implementation. One project has been completed. Three projects are ahead of schedule. Four projects have been delayed beyond their original schedules for various reasons. One funded project is intended to implement unspecified improvements in various areas of the district where additional natural trail opportunities are identified. The delays associated with the projects that are beyond their original schedules have been caused by a variety of factors caused by increased project knowledge and coordination that became apparent during the beginning assessments of these projects.

Factors that resulted in delay are summarized as:

- » Longer than expected jurisdictional land use, environmental and traffic reviews
- » Revised scope of work due to the inability of THPRD to acquire planned land for trail or park extensions
- » Need to acquire construction staging areas
- » Unexpected drainage and environmental issues
- » Need for alternative trail alignment analysis in environmentally sensitive areas
- » Need for trail easements and right-of-way crossing approvals from coordinating public agencies

Trails and Linear Park projects are summarized as follows, showing which have been completed, which are ahead of schedule and which have been delayed. Consistency with estimated costs is also indicated.

### **Westside Trail**

Segments #1, 4, and 7: Ahead of schedule, under budget, est. \$739,466 (Budget: \$4,307,511, expended to date: \$369,784)

### **Jordan/Husen Park Trail**

Delayed, under budget, est. \$218,473 (Budget: \$1,660,341, expended to date: \$225,734)

### **Waterhouse Trail Segments 1, 5 and West Spur**

Ahead of schedule, under budget, est. \$242,704 (Budget: \$3,840,213, expended to date: \$416,592)

### **Rock Creek Trail #5 and Allenbach, North Bethany #2**

Ahead of schedule, over budget, est. \$103,997 (Budget: \$2,283,556, expended to date: \$381,158)

Over budget due to environmental complexity, neighborhood issues and intergovernmental coordination resulting in additional consulting, staff coordination and construction costs.

### **Miscellaneous Natural Trails**

Projects to be determined. Delayed (Budget: \$100,969, expended to date: \$3,250)

### **Nature Park**

Old Wagon Trail: Completed, under budget, est. \$123,875 (Budget: \$362,563, expended: \$238,688)

### **NE Quadrant Trail**

Bluffs (Phase 2): Delayed, under budget, est. \$2,486 (Budget: \$259,536, expended to date: \$26,937)

### **Lowami Hart Woods**

Delayed, over budget, est. \$23,096 (Budget: \$830,034, expended to date: \$186,078) Over budget due to neighborhood concerns resulting in Master Plan revision and need for additional consulting and staff time.

### **Westside—Waterhouse Trail Connection**

Delayed, under budget, est. \$14,896 (Budget: \$1,557,196, expended to date: \$24,234)

Overall, the projects within this Bond Program category are within their overall budget. All combined actual and estimated project costs are approximately 8 percent below original estimates. THPRD staff have been working to overcome the factors that have delayed several projects, and those projects will move ahead as soon as these factors have been resolved.



The Westside Trail, where this family is having fun, is part of a planned north-south trail backbone that will eventually stretch for 10 miles within THPRD boundaries.

## WORKS IN PROGRESS



This new bridge at Jenkins Estate is one of many maintenance replacements funded by the Bond Measure.

## Deferred Park MAINTENANCE & Replacements



Approximately \$1,500,000 of bond funds were allocated to Deferred Park Maintenance projects. The bulk of the funds in this category are allotted for bridge/boardwalk

replacements and the introduction of permeable parking lots. All of the projects in this category have been fast-tracked and most are progressing or have been completed in a shorter amount of time than their initial schedule.

Overall, nine projects were identified, with five projects completed as of June 30, 2011. The play structure improvement projects at 11 sites are in various phases of implementation and are expected to come in under budget by over \$66,000. The Hartwood Heights bridge project was canceled due to low usage and a determination that the existing bridge could be repaired. The permeable parking lot at Sunset Swim Center is moving from the design development phase to construction documents. The Willow Creek project had a major scope change to include complete resurfacing and is in construction phase.

The Deferred Park Maintenance and Replacements category had spent \$1,168,400 or 80 percent of its total budget through June 30, 2011. The category is expected to be over-expended by approximately \$4,000 plus any overruns on the Sunset permeable parking lot once all projects are completed.

Significant cost overruns include \$21,000 at Jenkins Estate due to a scope change to replace two bridges rather than one, \$33,000 at Aloha Swim Center caused by increased concrete work and added parking spaces, and \$35,000 for the Willow Creek bridge/boardwalk project. The Sunset Swim Center permeable parking lot will be closely monitored as it may go over budget as design/development is completed.

## FACILITY Rehabilitation, Expansions & Improvements

### Facility Rehabilitation

There are 16 projects in the Facility Rehabilitation category, focusing on structural upgrades to improve egress in existing buildings in case of earthquake. Of the \$6,300,000 allotted to this category, \$701,000 or 11 percent has been spent to date. Three small projects have been completed along with the Sunset Swim Center pool which was 43 percent (\$220,000) under budget.

Eight of the projects were in the construction document stage as of June 30, 2011, and the project category was overall under budget by \$218,000. As bids are received and bid awards made from the projects in the construction document phase, updates to expected costs as well as budget over/under funding will occur. Many of these projects at each site are collections of separable tasks so that depending on the bids, the project scope can be adjusted to keep the category within overall dollar allotment.



Renovation and expansion of the Elsie Stuhr Center will be completed in the spring of 2012.

### Facility Expansion and Improvement

The Facility Expansion and Improvement project group includes \$8,300,000 for improvements at existing facilities. There are five projects in the category, of which three (the smaller ones) have been completed.



Stuhr Center patrons “55 and better” are already enjoying the new fitness room and equipment.

ADA dressing rooms at Aloha and the Tualatin Hills Aquatic Center have been completed as well as the Athletic Center HVAC upgrade. Bids have been awarded and revisions to budgets made on the Elsie Stuhr Center expansion and structural improvement (\$2,000,000), and the Conestoga Recreation & Aquatic Center expansion and splash pad (\$5,600,000).

Staff believes the contingency for the projects is sufficient; in fact, progress through September, 2011 had resulted in a \$202,000 net reduction in the estimated project costs, leaving the category under budget by \$245,000. Close attention will continue to be paid to potential change orders and scope changes determined to be necessary. Completion of the two larger remaining projects is expected in 2012.

As of June 30, 2011, a total of \$1,971,000 of \$8,300,000, or 24 percent of total budgeted dollars had been expended in this category.



**Improving ADA access has been a priority for THPRD at play equipment installations and other sites around the district.**

### ADA ACCESS Improvements

There are 14 specific projects in this category to which \$1,000,000 was allocated. At present there are no indications that the category will exceed its budget.

As of June 30, 2011, two smaller projects had been completed, at Bethany Lake Park and Lawndale Park. Two other projects (Lost Park and Waterhouse Powerline Park) had been folded into Play Structure Replacement projects in those parks. The Lost Park project was to be complete in August 2011, while the Waterhouse project is delayed due to unexpected environmental issues.

Most of the other projects are in the construction documents phase, with anticipated completion in late 2011 or early 2012. The project at Greenway Park is as yet unscheduled. The largest project, at the HMT Recreation Complex, is scheduled for completion in 2014.

### PROJECT Management, Bond Issuance Costs, Accounting

The goal for this category is 3 percent of the \$100,000,000 Bond Measure. As of June 30, 2011, actual expenditures were \$750,400, less than 1 percent of Total Program Allocation. This category of expenditures is expected to be higher during the implementation phases of a project and decrease as the project gets under way through completion.

Project Management costs are composed of Planning and Natural Resources staff time spent on each project (other than Land Purchases), including temporary personnel hired for the duration of bond funding (other than Land Purchases). THPRD transferred \$1,780,000 of the Initial Project Management and Bond Issuance Costs category to all projects (other than Land Purchases) based on individual project budget amounts to the total project budget. THPRD's accounting system tracks these costs for each individual project. Based on an accounting report provided by THPRD staff, total Project Management costs through June 30, 2011 totaled \$665,000, and Bond Issuance and Administrative costs totaled \$85,400.

# LOOKING BACK

In the 2010 report, this Committee recommended that THPRD develop a stronger set of reporting tools to facilitate the Committee’s responsibility for ensuring the appropriate use of bond funds. Staff worked closely with the Committee to develop those enhanced reporting tools, which have proved very helpful in seeing progress and understanding issues.

“Play is the only way the highest intelligence of humankind can unfold.”

JOSEPH CHILTON PEARCE



New play equipment at Lost Park in the Cedar Mill area spells f-u-n for two youngsters.

The Committee had recommended the following:

- » That staff and management time be more accurately accounted for in project budgets. This has been done by allocating funds dedicated for overhead to individual projects.
- » Additional work on performance measures: While THPRD has its own set of performance goals and targets, the Committee has not yet developed a set of measures to use for its own analysis of Bond Program projects. This is work yet to be completed.
- » Continued work on community outreach regarding bond projects and results. This has been done by THPRD, and continues.
- » A strong focus on land acquisition projects, and THPRD has responded by increasing staff and consultants dedicated to those projects. Initial results have been encouraging, as properties have been acquired at a higher rate in this fiscal year than in the last. This remains an area for close attention and monitoring.

The Committee also challenged itself to visit project sites and confirm implementation of projects. One tour of bond projects and acquisitions with Board members has taken place to date, and more are anticipated.

# LOOKING AHEAD



Bond funds will add more than six miles to THPRD's trails network, benefiting walkers, runners and bicyclists.

## The Committee has identified the following areas where it believes it can help THPRD direct its attention in the coming year.

The Committee recommends **additional attention to land acquisition for natural area preservation.** While the reasons for delay in these acquisitions are understandable, it is important that THPRD make progress on all categories of acquisition. The additional specialist hired by THPRD is a positive sign in this direction.

The Committee recommends **additional attention to natural area restoration projects.** Progress in this category has been limited to date. Some of the projects are linked to larger construction projects or acquisitions, and delays on these underlying projects cause delays for the Natural Area Restoration project that are outside the control of the Natural Resources staff. The Committee will pay close attention to this category in coming years.

The Committee will need **to monitor spending, progress, and results for the park projects into which athletic field funds have been combined,** to ensure that appropriate amounts have been spent on those fields, even though on an accounting basis they have been merged with park development projects.

THPRD will need **to account carefully for land acquisitions that generate results in more than one category,** such as parks, trails, and natural areas. THPRD has been appropriately opportunistic in pursuing properties that satisfy multiple needs, but the accounting should be more detailed by category.

THPRD will need **to develop a plan for remedying the over-spending of Neighborhood Park Land Acquisition funds** on some larger-than-anticipated properties. Those acquisitions represent strong and opportunistic selections, but they raise bond fund allocation issues that need to be resolved.

The Committee will **note instances where a project exceeds its budget and other sources of funding are applied to complete the project.** While this is a reasonable outcome for complex projects with unexpected changes, it will be important to closely monitor the promised allocation of bond funds to specific project categories.

The Committee will continue **to work with staff on accurate project status and budget reporting,** project performance measures, and overall bond progress reporting. This will include more on-the-ground review of project results.



## Bond Citizen Oversight Committee

**MISSION** On an ongoing basis, the charge to the Committee is to verify how much work has been done, how much money has been spent, and how those results match up to the promises described in the Bond Measure and its supporting materials. The Committee will continue to pursue this charge as its primary mission.

### Committee Roster

#### MEMBERS

Wink Brooks  
Rob Drake  
Wendy Kroger  
Boyd Leonard  
Rob Massar  
Matthew McKean  
Anthony Mills  
Stephen Pearson  
Jack Platten  
Marc San Soucie, Chair  
Paul Waldram  
Barbara Wilson

#### EX-OFFICIO MEMBERS

Bob Scott  
BOARD OF DIRECTORS  
Keith Hobson  
DIRECTOR OF BUSINESS &  
FACILITIES  
Hal Bergsma  
DIRECTOR OF PLANNING

*This report was authored and edited by the Committee.*



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# MAKING GOOD

# 2011



Tualatin Hills Park &  
Recreation District:  
2nd Report on  
Bond Measure Progress