



MEMORANDUM

Date: December 5, 2012

To: Chairman and Members
Pima County Bond Advisory Committee

From: C.H. Huckelberry
County Administrator 

Re: **Overviews of City, Town and County Bond Elections Held in 2012**

Background

The Trust for Public Land recently announced that 46 of the 57 revenue raising proposals for park and conservation related projects were successfully approved by voters this election cycle (November 6, 2012.) Some of these were part of large, multifaceted bond elections; others were small, single project measures.

Using this list as a starting point, a search was targeted at city or town bond measures similar to Pima County's bond elections (large, multiple ballot questions addressing a diversity of projects to be funded by property taxes). Also included were communities with single ballot measures, such as Tucson and Mesa, or park-related measures that funded several park-related projects like the Bend Oregon Parks and Recreation District. The overviews were not intentionally restricted to those communities where the bond measures were approved, but the resulting list includes only those with approvals. Austin, Texas voters did turn down one of several bond ballot questions related to affordable housing.

Through information on the internet and outreach to staff in those communities, overviews were developed for the following communities' bond measures:

Austin, Texas
Dallas, Texas
El Paso, Texas
Houston, Texas
Salt Lake County, Utah
San Francisco, California
Fairfax County, Virginia

Flagstaff, Arizona
Mesa, Arizona
Tempe, Arizona
Tucson, Arizona
Bend, Oregon Parks & Recreation District
Williamalane, Oregon Park & Recreation District

Table 1. Size, Project Types and Approval Levels.

Community	Bonds Authorized (\$millions)	Project Types	Voter Approval Percentage
Austin, Texas	\$307	Streets, open space, parks and recreation, public safety, health, libraries and art	55 to 61
Dallas, Texas	642	Streets, flood control, economic development	78 to 88
El Paso, Texas	473	Parks and recreation, museums, libraries, 17,000-seat entertainment arena	75 to 79
Houston, Texas	410	Public safety, parks and recreation, health, library, affordable housing	56 to 68
Salt Lake County, Utah	47	Regional parks and trails	57
San Francisco, California	195	Parks and recreation, waterfront	72
Fairfax County, Virginia	185	Libraries, fire stations, courtrooms, parks and flood control	70 to 78
Flagstaff, Arizona	24	Forest health and water supply protection, maintenance facility	53 to 74
Mesa, Arizona	70	Parks, recreation and trails	59
Tempe, Arizona	29.8	Police radio upgrades, parks and recreation, Tempe Lake dam and general facilities	60 to 66
Tucson, Arizona	100	Streets	50
Bend, Oregon	29	Parks, recreation and trails	52
Willamalane, Oregon	20	Parks, recreation and trails	53

Table 2. Length of Bond Programs.

Community	Length of Program
Austin, Texas	Unknown
Dallas, Texas	5 years
El Paso, Texas	15 years
Houston, Texas	5 years
Salt Lake County, Utah	Unknown
San Francisco, California	6 years
Fairfax County, Virginia	Unknown
Flagstaff, Arizona	10 years
Mesa, Arizona	4 years
Tempe, Arizona	5 years

Table 2. Length of Bond Programs.

Community	Length of Program
Tucson, Arizona	5 years
Bend, Oregon	Unknown
Willamalane, Oregon	Unknown

The bonds authorized at Pima County's 2004 bond election were estimated to be sold over 12 years through 2016, but will likely be sold by 2014, with 90 percent of the projects already completed in 2012; only 8 years after the election.

Table 3. Cost or Estimated Financial Impact.

Community	Estimated Financial Impact
Austin, Texas	No increase in this year's tax rate
Dallas, Texas	No increase in tax rate
El Paso, Texas	Monthly cost to average homeowner = \$5
Houston, Texas	No tax increase
Salt Lake County, Utah	Annual cost for residence valued at \$238,000 = \$5.73
San Francisco, California	Tax rate to be maintained at 2006 level
Fairfax County, Virginia	No increase in tax rate
Flagstaff, Arizona	No increase in tax rate
Mesa, Arizona	Annual cost per average assessed residence: \$24.84, or \$2.07 monthly
Tempe, Arizona	Annual cost on a house assessed at \$250,000 = \$28.95
Tucson, Arizona	Annual cost per \$100 of assessed valuation = \$18; \$0.33 rate increase
Bend, Oregon	Annual cost on a house assessed at \$200,000 = \$48, or \$4 monthly
Willamalane, Oregon	Annual cost on a house assessed at \$124,000 = \$42 or \$3.50 monthly

For comparison purposes, we estimated that the average monthly cost to the average homeowner for Pima County's 2004 \$582 million general obligation bond election at 4.51 cents.

Planning Prior to Election

The planning efforts undertaken by these communities to develop bond packages differed from one to another.

Austin appears to have had the most similar planning process to Pima County. A bond advisory task force was created to review staff proposals and proposals from the community. Staff first prioritized projects and the community provided input. The Council adopted guiding principles for prioritizing projects. Interestingly, one of the principles was consistency with the Imagine Austin Comprehensive Plan. The taskforce broke into committees to review projects by type. Bonding capacity and impact on taxpayers was considered.

The City of Mesa's process appears similar to Austin's and Pima County's.

Dallas' process was somewhat similar, but did not include an oversight committee. Staff's recommendations were taken to the public; and the City Manager then developed recommendations, which were again vetted by the public and then went to the Council.

Some bond packages appear to have come directly from a community's CIP plan with little refinement necessary; such as Tempe, for example.

Accountability and Oversight

The level of accountability and public oversight provided to voters pre- and post-election also varied. San Francisco is by far the most similar to Pima County regarding commitments to accountability, fiscal responsibility and transparency (truth in bonding, as we call it). The overview sheet for San Francisco includes these measures in full so that Pima County staff can review them more closely to determine if there are any that Pima County should consider adopting. Generally, they include the requirement that project scopes and budgets have a high level of detail prior to the election. Clear procedures are in place to address unexpected circumstances that may impact project delivery, including public protocols for reallocation of funds. Five committees, in addition to the Mayor and Council, provide regular oversight.

Prior to the City of Tucson's 2012 streets bond election, Tucson adopted a Truth in Bonding Policy. This policy requires appointment of an oversight committee that will meet no less than quarterly and issue annual reports. The streets that would be improved as a result of the bond election were identified on a map by fiscal year. If unanticipated circumstances require changes to those projects, the changes will require a majority vote of the Mayor and Council following a public hearing and recommendation by the oversight committee.

Austin and El Paso have bond overview committees that will meet quarterly or twice a year to review implementation.

Chairman and Members, Pima County Bond Advisory Committee
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The majority of the other communities were very much lacking in this area. Detailed project descriptions, costs and schedules did not appear to exist prior to elections, and the only oversight that appeared to exist post-election was the ability of the public to comment to elected officials.

In summary, with the exception of San Francisco, none of these communities provide voters or the public with nearly as strong and well-rounded accountability, fiscal responsibility and transparency measures as does Pima County.

CHH/mjk

Attachments

- c: The Honorable Chairman and Members, Pima County Board of Supervisors
Nicole Fyffe, Executive Assistant to the County Administrator
Diana Durazo, Special Staff Assistant to the County Administrator

2012 City of Austin Texas Bond Election - \$307 million

Overview of Projects

Approved \$307 million:

- Proposition 12: Transportation and Mobility \$143.3 million, approved at 55%
- Proposition 13: Open Space and Watershed Protection \$30 million, approved at 56%
- Proposition 14: Parks and Recreation \$77.7 million, approved at 59%
- Proposition 16: Public Safety \$31.1 million, approved at 55%
- Proposition 17: Health and Human Services \$11.1 million, approved at 60%
- Proposition 18: Library, Museum and Cultural Arts Facilities \$13.4 million, approved at 61%

The following bond proposition did not earn voter approval:

- Proposition 15: Housing \$78.3 million, failed at 51%

Length of Program

Could not find reference to this on website. It does appear that the City is currently implementing bond programs authorized in 2006 and 2010.

Cost

- \$307 million authorized
- States that no increase in this year's tax rate is anticipated as a result of passage of these propositions.

Planning

Planning started in October 2011 with the City Council adopting a resolution creating the bond election advisory task force. The Task Force was to consider initial recommendations provided by City Staff and input from the community to make their recommendations or Council and staff consideration. The Task Force is made up of 15 members, 2 members appointed by each of the 7 councilmembers, plus Planning Commission appointment. The Task force had subcommittees that focused on specific project types.

The Council adopted guiding principles for developing the bond package:

- Infrastructure: Provide for adequate infrastructure and facilities to maintain City services
- New Initiatives: Support new investments reflecting the values and priorities of the City as identified in the Imagine Austin Comprehensive Plan and related plans. These include investing in a compact and connected Austin, growing and investing in Austin's creative economy, and using green infrastructure to protect environmentally sensitive areas and integrate nature into the City.
- Mobility: Make investments in new mobility capacity
- Sustainability: Promote a sustainable community and high quality of life
- Cost-Effectiveness: Identify projects that are cost-effective, leverage other funding sources and maximize the benefit of capital investment
- Balanced Approach: Consider the balance of priorities in a proposed bond package

The City of Austin's Capital Planning Office managed the planning and public input process. Their website appears to be a useful tool for the public and others to gain an understanding of the planning process and find information on the committees.
<http://www.austintexas.gov/department/2012-bond>

Accountability and Oversight

The Council appointed a bond oversight committee that meets no less than once every six months to oversee implementation of the 2006, 2010, and now 2012 bond programs. The committee is made up of 7 members, 1 appointed by each of the Council members. At least one member is to be an engineer.

It does not appear that the public has much detail on the projects to be funded. In fact the projects listed in the informational materials are done so with the following caveat: "The types of projects and programs to be undertaken as part of this bond proposition, if approved, may include but are not limited to the following:" Detailed scopes, costs and implementation timelines did not appear to be available.

Contact

Molly Scarbrough, Capital Planning Office, 512-974-7629

2012 Dallas Texas Bond Election - \$642 million

Overview of Projects

All 3 propositions passed:

- 88% voter approval - Streets \$261 million
- 82% voter approval - Flood control \$326 million
- 78% voter approval - Economic development \$55 million

Length of Program

5 years

Cost

- \$642 million authorized
- Structured so as to no require the tax rate to be raised.

Planning

Internal needs assessment 2006-2011, Public input Feb/March 2012, council briefings April/May 2012, recommended City Managers plan June 2012, public comment June 2012, council deliberation August 2012, council calls bond election August 2012, election November 2012.

The public comment period in June 2012, included 21 meetings held at various locations throughout the city.

\$10 billion in needed projects were narrowed down to the \$642 million of projects that could be constructed over a 5 year period. Due to limited financial capacity, the City Manager recommended that the 2012 Bond Program focused on critical capital needs that:

- Preserve and restore streets and other street related assets
- Protect lives and property from flooding
- Promote economic development to continue and grow the tax base

Dallas has a history of similar bond elections dating back to 1963. They had a successful 2006 bond election for \$1.35 billion for a variety of projects. They report that by November 2012 98% of those projects have been completed. Also in 2003 they had a successful \$579 million bond election.

Accountability and Transparency

While the City Manager's presentation materials include cost estimates for specific projects by council district, it doesn't appear that an ordinance actually commits the City to these amounts. It also doesn't appear that the City has a pre or post bond election oversight committee.

El Paso, Texas 2012 Quality of Life Bond Issue - \$473 million

Overview of Projects

At the November 6, 2012 election, voters in the city of El Paso, Texas approved two ballot questions authorizing over \$473 million in general obligation bond funds for projects related to parks and recreation, neighborhood improvements, zoo and museum improvements, cultural and performing arts facilities, and libraries. Attached is a list of the 40 projects. The largest single project is a \$180 million new downtown multipurpose 17,000 seat arena. In addition, voters approved a hotel tax to finance a \$50 million minor league baseball stadium. The City and groups in favor and opposed to these measures referred to them as the 2012 Quality of Life Bonds.

- Approved by 79%: Proposition 1 Parks, Recreation, Open Space, and Zoo Improvements (\$245 million)
- Approved by 75%: Proposition 2 Museum, Cultural, Performing Arts and Library Facilities (\$228.25 million including the \$180 million for the multipurpose arena)
- Approved by 63%: Proposition 3 Baseball Stadium and Hotel Tax (\$50 million)

Cost and Length of Bond Programs

According to a website supporting the bond initiatives, elpasobonds2012.com, bond funds for propositions 1 and 2 would be sold over a 15 year time period to fund the construction of the listed projects. The average cost to the average homeowner is listed as \$5 a month with a note that the tax rate should not exceed 4 cents of \$100 of assessed value.

Planning Process to Develop List of Projects

Public bond outreach program conducted in early 2012
Soccer stadium at \$100M discussed in early 2012, but final package reduced to \$10M.

Accountability and Oversight Measures

In August, 2012, the City Council created by resolution a Bond Overview Advisory Committee to "review the progress of the 2012 Bond Issue Projects and to provide oversight and feedback to City staff with regard to project expenditures and implementation." The Committee is to have 9 members appointed by the Mayor and each of the City councilmembers. A majority should have business or finance experience and at least two should have project management experience. The City Engineering and Construction Management Department will staff the committee. It appears the first meeting would be held in January 2013. The Committee is to meet at least quarterly to review staff reports and report twice a year to the Mayor and Council on the status of implementation.

2012 City of Houston Bond Election - \$410 million

Overview of Projects

5 Propositions/ballot questions – all passed:

- \$144 million in Public Safety Improvement Bonds, approved by 65%
- \$166 million in Park Improvement Bonds, approved by 68%
- \$57 million in Public Improvement Bonds for health, sanitation/recycling and essential improvements at city facilities, approved by 64%
- \$28 million in Library Improvement Bonds, approved by 62%
- \$15 million in Public Improvement Bonds for affordable housing efforts, approved by 56%

Length of Program

5 years

Cost

- \$410 million
- Informational materials state that this is not a tax increase as new bonds are only sold as old bonds are paid off.

Planning

Not much info online. Note that Houston had successful bond elections in 1997 (\$545 million), 2001 (\$776 million), 2006 (\$625 million). Awaiting a response from Houston staff.

Accountability and Oversight

Not much info online.

2012 Salt Lake County Bond Election for Regional Parks and Trails - \$47 million

Overview of Projects

Approved by 57%:

The Regional Parks and Trails bond will provide the means to build three new regional parks in Bluffdale, Draper and West Valley/Kearns, acquire land for future park development in the Magna area and substantially complete the Jordan River Parkway Trail and Parley's Trail connecting the entire Salt Lake Valley.

Length of Program

Information not found online.

Cost

- \$47 million authorized
- Estimated annual cost for a residence valued at \$238,000: \$5.73
- Estimated annual O&M costs: \$580,950

Planning

6 open houses scheduled after the election was called and projects selected. News article states that initially the Mayor took an \$110 million parks bond proposal to the Council in 2011, who turned it down citing concerns about the cost, economy and ongoing O&M costs.

Accountability and Oversight

Scope and cost per park and trail are included in an informational brochure.

2012 San Francisco Clean & Safe Neighborhood Parks Bond - \$195 million

Overview of Projects

Single ballot question – Passed by 72%:

- \$99 million for Neighborhood Parks, selected based on community feedback, their physical condition, the variety of amenities offered, seismic safety risk, and neighborhood density
- \$34.5 million for Waterfront Open Spaces
- \$15.5 million for Failing Playgrounds
- \$12 million for the Community Opportunity Fund
- \$21 million for Golden Gate Park, Lake Merced Park, and McLaren Park
- \$13 million for forestry, trails, and water conservation

Length of Program

6 years – Planning through construction to be complete in 6 years.

Cost

- \$195 million authorized
- Informational materials state that bonds are sold after other bonds are retired with the intent to keep property tax rates at 2006 levels. It is described as a bond measure that will not result in new taxes.

Planning

From information available on the web, it appears that 3 months worth of community outreach and input was used to shape the list of projects that may have originated out of the City's 10 year CIP plan and a similar parks and recreation bond measure that was approved by voters in 2008.

Note that San Francisco had a successful bond election in 2008 for \$185 million for parks and recreation projects.

Accountability and Oversight

Excerpts from detailed informational report:

During the development of the 2008 Clean and Safe Neighborhood Parks Bond, voters helped us to develop more robust fiscal accountability measures. Those measures have been incorporated into the 2012 bond proposal, and include:

- Strong bond ordinance language specifying projects and budgets. Voters will have a clear understanding of how funds will be used, and have a guarantee that the city will complete projects.
- Extensive cost estimating to ensure realistic, deliverable project budgets. Neighborhood park project budgets have been reviewed by 3rd party professional engineering and construction management firms.
- Established procedures for the unexpected. Whether there are bid savings or cost overruns, clear public protocols exist to guide any re-allocation of funds.
- Citizen oversight of Bond expenditures and program implementation. The Citywide Capital Planning Committee, the Citizen's General Obligation Bond Oversight Committee (CGOBOC), the Parks, Recreation and Open Space Advisory Committee (PROSAC), the Recreation and Park Commission, the Port Commission, the Mayor and Board of Supervisors all provide regular oversight and offer forums for public comment and feedback.

The San Francisco Clean and Safe Neighborhood Parks Bond (the "Bond") includes strict standards of accountability, fiscal responsibility, and transparency. In addition to complying with applicable federal and state legal restrictions, the Bond is subject to a comprehensive public oversight and accountability process. The following principles apply to all projects and programs funded through the Bond:

- Each of the projects in the Neighborhood Parks program is identified by name and location, with a realistic scope, schedule, and budget (with an inflation factor tied to the time of construction). The Recreation and Parks Department is committed to each of these specific projects.
- The Bond includes specific funding for the Citizen's General Obligation Bond Oversight Committee (CGOBOC) to conduct regular audits of bond expenditures as required by the Administrative Code Section 5.30 to 5.36. CGOBOC will conduct a quarterly review of bond spending in a public hearing and issue an annual report on the bond program to various public bodies including: the Parks, Recreation, and Open Space Advisory Committee (PROSAC), Recreation and Park Commission, Port Commission, Board of Supervisors, and the Mayor.
- The Recreation and Parks Department and Port of San Francisco will jointly present on the Bond's expenditures and the program schedule in an annual public hearing before the Capital Planning Committee. This will allow for public participation and an open forum for the community to provide feedback.
- Proposed changes in budget, scope, or priorities in the bond programs will be presented before the Recreation and Parks Commission or Port Commission, Capital Planning Committee or other regulatory approvals as required, and undergo a public hearing, review, and approval process, should any changes be necessary. These changes will be incorporated into the City's 10-year Capital Plan.
- If any project in the Neighborhood Parks and Citywide Program categories exceeds its total budget by no more than 10%, then such additional funding may be allocated from Program Contingency funds, subject to approval of the revised budget by the General Manager of the Recreation and Parks Department.
- Any project in the Neighborhood Parks and Citywide Program categories that exceeds the total project budget by more than 10% and up to 15% then such additional funding may be allocated from Program Contingency funds, pending approval from the Recreation and Parks Commission.
- Any project in the Neighborhood Parks and Citywide Program categories that exceeds the total project budget by more than 15% are required to adjust scope to within 15% of the original total budget, then pending approval of the revised scope from the Recreation and Parks Commission, such additional funding may be allocated from Program Contingency funds, pending approval of the revised scope from the Recreation and Parks Commission.
- Any and all savings from projects that are completed under the budgeted amount or which acquire additional revenue from other sources and, as such, require less bond funding than budgeted, shall allocate remaining proceeds or bonding authority to the Contingency Fund.
- Any remaining funds in the Program Contingency fund at the time of award of the construction contract for the last project will be allocated by the Recreation and Park Commission to one of the Citywide Programs.
- The sale and the issuance of all bonds for projects identified in this measure require review and approval by the Capital Planning Committee and the Board of Supervisors. At least 60 days prior to the approval of bonds after the initial sale and issuance, the Recreation and Park Department and Port of San Francisco will jointly submit a Bond Accountability Report to the Clerk of the Board of Supervisors, Controller, Treasurer, Director of Public Finance, and the Budget Analyst describing the current status, expenditure, and schedule for each project and confirm that expenditures are in conformance with the express will of the voters.

- **The Recreation and Parks Department and the Port of San Francisco will each have accessible and visible portion for their respective websites dedicated to publishing information on the bond program, with status reports on project progress, expenditures, and schedules updated quarterly.**

2012 Fairfax County, Virginia Bond Election - \$185 million

Overview of Projects

- Approved by 70% - \$25 million to renovate three libraries and build a fourth
- Approved by 75% - \$75 million to rebuild three fire stations and renovate 22 courtrooms
- Approved by 72% - \$55 million to expand and improve county and regional parks
- Approved by 78% - \$30 million to build a levee and pumping station to protect the Huntington community from floods

Length of Program

Nothing found online regarding how long it would take to complete the projects or over how many years the bonds would be sold.

Cost

- \$185 million authorized
- Program designed to not require tax rate increases.

Planning

An informational brochure describes the planning process for identifying parks projects as beginning with a 2004 needs assessment and progressing to a 10 year CIP plan. Nothing else found online with regard to how the projects were identified.

Accountability and Oversight

An informational brochure does contain details on which libraries, fire stations and parks would receive bond funding. Allocations are specified for individual libraries and fire stations, but allocations are more programmatic in nature for parks (i.e. not a specific allocation per park, instead allocations are made for land acquisition, new parks, expansion, etc.). However, the brochure also states that the County, at its discretion, could by law spend the funding on other projects so long as they meet the intent of the overall bond question.

Nothing online to suggest they have a bond oversight committee.

2012 Flagstaff Bond Election - \$24 million

Overview of Projects

- \$10 million for Forest treatments to prevent wildfires and flooding; improvements at Lake Mary to protect Town's water supply and water quality, Approved by 74%
- \$14 million for construction of City maintenance facilities, Approved by 53%

Length of Program

10 years

Costs

- \$24 million authorized
- No increase in tax rate as new bonds are sold as old bonds are paid off

Planning

Planning for the maintenance years project has been ongoing since 2003. Two separate bond planning committees were created in 2003/2004 and 2009/2010 to identify the projects going in to the 2004 and 2010 bond elections. The maintenance yard project did not make it on the 2004 bond list, and it was not passed by voters when included in the 2010 bond program election. The City did not form a citizens committee for the 2012 bond election.

The forest initiative project came out of the inclusion of the targeted watersheds in their 2005 Community Wildfire Protection Plan. The 2010 Schultz Fire and flooding elevated the threat and need. City staff held a workshop on this issue in early 2012, and the City Manager asked that this project be brought before the Council for inclusion in the 2012 bond election.

Accountability and Transparency

An information pamphlet was developed containing details on the two bond projects as to location, need, and how the projects were identified. The Council receives updates on the status of bond projects during their work sessions. There is no mention of an oversight committee. However, City staff indicated that the Greater Flagstaff Forest Partnership and a separate citizen group that did the bond outreach effort for the forest initiative on the ballot, will be involved in a City Oversight Team, which is still being vetted.



MEMORANDUM

Public Works Administration



DATE: September 17, 2012

TO: C. H. Huckelberry
County Administrator

FROM: Nanette M. Slusser 
Assistant County Administrator for Policy

RE: City of Mesa 2012 Bond Package

The City of Mesa's November 6, 2012 Bond Election requests authorization to issue and sell \$70 million in general obligation bonds for parks, open space, recreational and aquatic facilities. The bond package contains 18 projects in the 2012 Parks and Recreation Bond Program, which focuses on five areas:

1. Parks conversion and improvement projects
2. Community Partnership Projects
3. iMesa Park Renovation and Enhancement projects
4. iMesa New Park Development Projects
5. iMesa Bike and Pedestrian Path Projects

These areas included a variety of recreational assets such as sports fields, playgrounds and bicycle-pedestrian friendly paths and trails. The Mesa City Council focused on parks and recreation projects because the topic drew the most citizen responses, as past lean budgets resulted in many parks in varied states of dilapidation. The Council challenged its citizens, who wanted a trendsetting community, to propose ideas for community improvements.

Process

Similar to Pima County Bond Advisory Committee, Mesa City Council approves recommendations from the iMesa Steering Committee, Parks and Recreation Advisory Board and Transportation Advisory Board for their parks and recreation projects. The Council appoints 11 members each to the committee and both advisory boards. The Transportation Advisory Board is involved because of the bike and pedestrian projects included in the package. The iMesa Steering Committee members work with the advisory boards and guide the proposed projects selection process based on citizen responses to iMesa.

The iMesa is a citizen-driven process, a grassroots citizen investment and improvement effort to develop Mesa's community projects. Using the iMesa online forum, citizens provide improvement project suggestions to the iMesa Committee Members, who vet all project proposals and select, prioritize, and recommend projects to Mesa Mayor and Council based on the majority and feasibility of citizen responses.

Mesa citizens provide input at public committee meetings and through the city's iMesa online forum at <http://imesa.mesaaz.gov/forums/97091-imesa-ideas>. Citizens propose projects on the forum and others respond with their support or opposition to the proposed projects. The city also enables citizen input through the iMesa's Facebook page, a smart phone app for Android, and UserVoice site so that citizens can provide input 24-7 from anywhere in the world where there is Internet access.

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Costs

In addition to the \$70 million in project costs, the 2012 bond package includes \$2,225,000 in operation and maintenance costs, which will be phased over the next four years. After 60 years without city property tax, in 2008, Mesa voters agreed to pay secondary property taxes for the general obligation bond debt. The annual cost per average assessed home property value is \$24.84 annually (\$2.07 monthly), unless the Council decides to use other sources for payments. If approved, citizens will repay bonds through secondary property taxes for up to 25 years. See attached presentation to Mesa Mayor and Council for details on project costs. No data was found related to bonding criteria or anything akin to the Pima County Truth in Bonding Code.

NMS:ism

Attachment

c: **John M. Bernal, Deputy County Administrator, Public Works**
Nicole Fyffe, Assistant to the County Administrator

2012 Tempe, Arizona Bond Election - \$29.8 million

Overview of Projects

3 ballot questions all approved:

- Approved by 66% - \$6.4 million for police/city radio interoperability upgrade
- Approved by 65% - \$10.5 million for parks and recreation projects, including replacing Tempe Town Lake dam
- Approved by 60% - \$12.9 million for repair, rehabilitation, and improvement of municipal facilities

Length of Program

Bonds to be sold over 5 years and paid off over 20 years.

Cost

- \$29.8 million authorized by voters
- Publicity pamphlet estimates an annual cost of \$28.95 on a house with an assessed value of \$250,000.

Planning

From Ken Jones, Director of Finance and Technology for Tempe: We maintain an ongoing 5-year list of projects in our Capital Improvement Program (CIP). We hold public meeting every year when potential projects are evaluated and prioritized for inclusion in the CIP. Funding sources are listed for each project in the CIP (e.g., enterprise fund user fees, grant funding, G.O. bond funds, excise tax revenue bonds, etc.). We issue bonds every year to fund the projects that are underway. Every 4 years or so, we assess the need for bond authorization, based on the approved CIP projects that will require bond funding and the authorization remaining. The bond questions are specific to functions, such as public safety equipment or park improvements, but general enough to enable us to issue the necessary bonds for the projects within the CIP.

Note that Tempe held a successful \$241 million bond election in 2008.

Accountability and Oversight

From Ken Jones, Director of Finance and Technology for Tempe: Our CIP is online -- <http://www.tempe.gov/modules/showdocument.aspx?documentid=10040> -- and provides a summary of all projects, along with the funding sources. Details of each project are also provided. The projects that require bond funding are reviewable by the public prior to bond elections and we provide annual updates on the status of projects that are included in the CIP, so it is clear that the projects being completed are the same projects listed when bonding authorization was sought. We also provide a public update of our Debt Service Fund each year, where we include 10-year projections of secondary property tax revenues and debt service payments associated with our G.O. bonds to ensure we stay within our debt and fund balance policies.

2012 City of Tucson Bond Election - \$100 million

Overview of Projects

\$100 million for the restoration, repair, resurfacing and improvement of city streets:

- Approximately 85% of bond funds will be allocated to major streets with the remainder allocated to neighborhood streets.
- Approximately 130 miles of major streets and 114 miles of neighborhood streets will be resurfaced as part of the bond program.

Length of Program

5 years

Costs

- \$100 million
- Annual cost for \$100 of assessed valuation: \$18
- Average secondary property tax rate increase of 33 cents

Planning

These streets were selected based on a comprehensive engineering analysis of the condition of City streets and a determination of the appropriate paving treatment based on the condition.

Accountability and Transparency

- The Mayor and Council have adopted a Truth in Bonding Policy to ensure that no change can be made to the purpose for the bond funds (resurfacing City streets) without going back to voters for approval.
- A Citizen Bond Oversight Commission will oversee the expenditure of bond funds to ensure they are expended as approved by voters.
- The Commission will be appointed after the election, consisting of 11 members, 7 appointed by the Mayor and Council and 4 appointed by the City Manager. The Commission will meet quarterly to review reports and will issue an annual report to the public.
- Informational pamphlet included a map showing the major streets to be resurfaced with bond funds and the fiscal year in which each would occur. The map also stated that this is the current plan and if unanticipated circumstances require a change to this plan, the changes will require a majority vote of Mayor and Council following a public hearing and recommendation by the Bond Oversight Commission.

<http://cms3.tucsonaz.gov/street-bonds>

Bend, Oregon, Parks and Recreation District - \$29 million

Overview of Projects

Approved by 52%, the \$29 million would be spent on:

- Deschutes River Trail & Parks
- Colorado Dam Safe Passage
- Land for Southeast Bend Parks
- Simpson Ave. Community Recreation Center
- Pine Nursery Park Phase II

Length of Program

Information not found online.

Cost

- \$29 million authorized
- The estimated cost to the owner of a home assessed at \$200,000 would be \$4 a month or \$48 a year.

Planning

2004 and 2008 needs assessment, followed by 2011 Capital Improvement Plan, refined in 2012 with a Trust for Public Land assisted poll and additional public outreach, and the Board of Directors calling the election in July 2012.

Accountability and Oversight

- The Board would provide oversight of the projects.
- Proceeds would be audited and open for public review.
- Informational materials included detailed project scopes and histories, but only general estimates of the distribution of the total bond dollars per overarching project area.

Contact

info@bendparksandrec.org.

Willamalane, Oregon Parks and Recreation District 2012 Bond - \$20 million

Overview of Projects

Approved by 53%, the \$20 million in bond funds will be used to:

- Acquire land for future parks and trails.
- Preserve natural areas, protect wildlife habitat, and protect water quality in rivers, creeks and streams.
- Develop new parks, trails and athletic fields.
- Improve and renovate existing parks and trails.
- Implement energy conservation projects at recreation facilities.

Length of Program

Unknown.

Costs

- \$20 million authorized
- Bonds to be paid off over 21 years
- The estimated additional monthly cost for the owner of a home with a median assessed value of \$124,000 would be about \$3.50 per month, or \$42 per year.

Planning

Willamalane recently updated its 20-year plan – a process guided by significant public input. In addition to funds from grants, development charges and Willamalane's operating budget, bond funds will be used to accomplish the first phase of the 20-year plan. Willamalane gathered input from more than 2,000 local residents who completed surveys and attended special events and workshops as part of an update to Willamalane's 20-year plan.

Accountability and Oversight

- The ballot language requires that the money be used solely for the purposes described, but this is somewhat general: "Shall Willamalane improve parks, trails, recreation facilities; protect water, natural areas, wildlife; Issue Up To \$20 Million General Obligation Bonds?"
- The elected Board of Directors will hold open and advertised public meetings to evaluate projects based on the 20-year plan.
- All funds will be subject to yearly independent audits.

Contact

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