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Metro 2019 Bond Measure to
Protect and Connect Nature and People

___Local Share Handbook___

March 2021

Public service

*We are here to serve the public
with the highest level of
integrity.*

Excellence

*We aspire to achieve exceptional
results.*

Teamwork

*We engage others in ways that foster
respect and trust.*

Respect

*We encourage and appreciate
diversity in people and ideas.*

Innovation

*We take pride in coming up with
innovative solutions.*

Sustainability

*We are leaders in demonstrating
resource use and protection.*

Metro's values and purpose

We inspire, engage, teach and invite people to
preserve and enhance the quality of life and the
environment for current and future generations.

Metro brings together greater Portland to preserve farms and forests, protect water and wildlife, and create communities people want to call home. Led by an elected council, this unique government helps plan for the future and offers places, services and tools that make life better today.

Metro Parks and Nature protects water quality, fish and wildlife habitat, and creates opportunities to enjoy nature close to home through a connected system of parks, trails and natural areas.

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2019 PARKS AND NATURE LOCAL SHARE HANDBOOK

Table of Contents

PART 1: BOND INTENT AND PRINCIPLES	- 7 -
1 INTRODUCTION	- 7 -
2 PURPOSE OF THIS HANDBOOK	- 7 -
3 2019 BOND EMPHASIS ON EQUITY	- 8 -
4 2019 BOND MEASURE PRINCIPLES	- 9 -
PART 2: LOCAL SHARE CRITERIA AND ELIGIBLE INVESTMENTS	- 11 -
5 LOCAL SHARE PROGRAM CRITERIA	- 11 -
5.1 COMMUNITY ENGAGEMENT AND RACIAL EQUITY	- 11 -
5.2 SUPPORTING RESILIENT COMMUNITIES (PROGRAM CRITERIA 5)	- 15 -
6 ELIGIBLE LOCAL SHARE INVESTMENTS	- 16 -
6.1 NATURAL AREA OR PARK LAND ACQUISITION	- 16 -
6.2 FISH AND WILDLIFE HABITAT RESTORATION, HABITAT CONNECTIVITY ENHANCEMENTS	- 18 -
6.3 MAINTAINING OR DEVELOPING PUBLIC ACCESS FACILITIES AT PUBLIC PARKS AND NATURAL AREAS	- 18 -
6.4 DESIGN AND CONSTRUCTION OF LOCAL OR REGIONAL TRAILS	- 19 -
6.5 ENHANCED OR NEW LEARNING/ENVIRONMENTAL EDUCATIONAL FACILITIES	- 19 -
7 LOCAL SHARE PROJECT-SPECIFIC CRITERIA	- 20 -
7.1 CLIMATE RESILIENCY CRITERIA	- 20 -
7.2 ADDITIONAL PROJECT-SPECIFIC CRITERIA	- 21 -
PART 3: RESPONSIBILITIES, PROJECT PROPOSALS AND FUNDING	- 25 -
8 RESPONSIBILITIES OF METRO AND PARK PROVIDERS	- 25 -
8.1 METRO	- 25 -
8.2 COMMUNITY OVERSIGHT COMMITTEE	- 25 -
8.3 PARK PROVIDERS	- 25 -

9	DISTRIBUTION OF FUNDS	- 26 -
9.1	ALLOCATION OF LOCAL SHARE FUNDS	- 26 -
9.2	ELIGIBLE CAPITAL COSTS	- 26 -
9.3	10% CAP ON STAFF, OVERHEAD, AND INDIRECT PROJECT COSTS	- 26 -
9.4	BUDGETING	- 27 -
10	PROJECT PROPOSAL AND APPROVAL	- 27 -
10.1	STEPS FROM PROJECT SUBMITTAL TO APPROVAL	- 27 -
10.2	PROJECT SUBMITTAL PACKAGE	- 28 -
10.3	RELEASE OF FUNDS	- 29 -
11	TECHNICAL ASSISTANCE	- 30 -
11.1	STAKEHOLDER ENGAGEMENT	- 30 -
11.2	EQUITY IN CONTRACTING	- 30 -
11.3	LAND ACQUISITION	- 30 -
11.4	LAND STABILIZATION AND HABITAT ENHANCEMENT	- 30 -
11.5	DEMOGRAPHIC AND PARK USAGE GEOSPACIAL DATA	- 30 -
12	MONITORING AND DATA TRACKING	- 30 -
12.1	TRACKING OUTCOMES	- 30 -
12.2	REPORTING IMPACTS	- 30 -
13	ADDITIONAL RESOURCES	- 31 -
14	AMENDMENTS TO HANDBOOK	- 31 -

PART 1: BOND INTENT AND PRINCIPLES

1 INTRODUCTION

Over the past quarter century, under the leadership of the Metro Council and in collaboration with dozens of partners, the people of the greater Portland metropolitan area have protected, restored and developed a remarkable system of parks and natural areas, with plans to ultimately link them by what is, even today, an extensive trail network. This deliberate and thoughtful effort sets us apart from other metropolitan regions and contributes significantly to our quality of life, matched in few other places.

The success of this collaborative effort is due in no small part to the work of local jurisdictions in placing land in public ownership, connecting communities with their natural environment and providing for the wellbeing of adults and children through outdoor recreation.

Building on this legacy, on November 5, 2019, voters across greater Portland approved Metro's 2019 Bond Measure to Protect and Connect People to Nature (the "bond measure"), authorizing Metro to issue general obligation bonds in the amount of \$475 million ("bond funds") to fund natural area and water quality protection and to connect people to nature. The bond measure is comprised of six funded programs:

1. Protect and restore land, \$155 million
2. Support local projects (local share), \$92 million
3. Nature in Neighborhoods capital grants, \$40 million
4. Take care of Metro parks, \$98 million
5. Create trails for walking and biking, \$40 million
6. Advance large-scale community visions, \$50 million

2 PURPOSE OF THIS HANDBOOK

This local share program handbook defines the general process Metro intends to use to distribute \$92 million dollars of bond funds to the cities, counties and other park providers enumerated in the bond measure for land acquisition and eligible capital projects. The local share program builds upon the success of the 1995 and 2006 bond measures, which distributed \$25 million and \$44 million respectively to local park providers for land acquisition, water quality and habitat restoration, trail connections, community parks and capital improvements that provide environmental education and connect people with nature.

This local share program handbook describes key overall bond measure and local share program criteria. This handbook is not intended to create or constitute any legally binding obligations, but rather it is intended to describe desired outcomes and provide general guidance to eligible park providers across the region on how to access their local share allocation. It also provides guidance for local share implementation, addressing how bond funds may be administered to ensure delivery of the outcomes described in the bond measure.

3 2019 BOND EMPHASIS ON EQUITY

Metro works to improve the quality of life for greater Portland's 1.5 million residents. Here in the Pacific Northwest, quality of life is often described in terms of access to, and enjoyment of, the abundant natural beauty that defines our part of the planet and the fish and wildlife that grace our lands and waters. Previous bond measures provided the means to acquire today's network of natural areas, restore habitat and ecological functions to these sites and open them for public enjoyment where appropriate. This bond measure builds upon past accomplishments with an aim to further protect land, water and habitat while supporting and encouraging human connection to nature. This bond does so with a greater emphasis on making access and investments more equitable.

Like most of the nation, the Portland region's communities are becoming more diverse. It is projected that by the year 2045, communities of color will be the majority. In recent years, a growing recognition of the inequities in our public systems has prompted Metro to step forward to address racial equity.

Racism is a deeply rooted system that continues to perpetuate inequities for Black, Indigenous, and other people of color across every facet of life and, therefore, they experience worse outcomes in every indicator of social well-being. Although these inequities are faced by other historically marginalized groups—people with low incomes, seniors and people with disabilities, people with limited English proficiency, immigrants and refugees, and people who have experienced or are experiencing housing instability—the pervasiveness and systemic nature of racism disproportionately impacts communities of color. It is because of this that Metro has identified racial equity as the measure to ensure that all people who live, work and recreate in the greater Portland area have opportunities to share in and help define a thriving, livable and prosperous region. By addressing the barriers experienced by communities of color, we will effectively also identify solutions and remove barriers for other under-resourced communities.

If we make full use of the opportunities afforded by this bond to break down these barriers, it will make outsized impacts and do far more to meet the complex needs in our region. When park and natural area projects are selected, built, and maintained in a way that seeks to lift up and give power to voices that have been historically marginalized, decisions are ultimately made that benefit everyone. When everyone can enjoy parks and natural areas, they become essential elements of vibrant communities.

Metro embraces its responsibility to help remove the barriers of institutional racism that keep our region from achieving its fullest potential. In 2016, the Metro Council identified racial equity as the lens through which it seeks to identify and remove institutional barriers and increase equitable outcomes for Black and Indigenous communities and other communities of color in greater Portland (See Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion in Section 13-Additional Resources)

Therefore, in developing the 2019 bond measure, Metro reached out to a broader set of stakeholders than it had for previous measures and focused on elevating the voices of historically marginalized communities, including members of the urban Indigenous community and leaders from culturally specific organizations, while tapping the deep knowledge of conservation practitioners and park providers throughout the region.

This expanded group of stakeholders helped shape the structure, content and criteria of the 2019 bond

measure. As a result, this parks and nature bond measure is different from those passed in 1995 and 2006. Like past measures, this one focuses on protecting wildlife habitat and water quality, making park improvements and connecting people to nature close to home. In contrast, this bond measure prioritizes serving people of color, Indigenous people, people with low incomes, people with varying abilities and other historically marginalized groups that have not benefited equitably from past investments. It requires that all programs funded by this bond are shaped through meaningful stakeholder engagement, are developed using a racial equity lens and work to make the region more resilient to climate change.

4 2019 BOND MEASURE PRINCIPLES

Based on community and partner engagement and input from stakeholders, the voter-approved bond measure included the following guiding principles in Exhibit A of the bond measure (See Section 13-Additional Resources). Local park providers must apply these principles when selecting projects for local share funding:

Serve communities through inclusive engagement, transparency and accountability.

Continue to build trust and relationships through engagement of the region's diverse communities in the identification, planning and implementation of all Metro bond-funded projects. Develop tools to evaluate and report on impacts, and adjust course as needed.

Advance racial equity through bond investments.

Set aspirational goals for workforce diversity and use of minority-owned and diverse contractors identified through Oregon Certification Office for Business Inclusion and Diversity (COBID) and work to reduce barriers to achieving these goals. Demonstrate accountability by tracking outcomes and reporting impacts.

Protect clean water for people, fish and wildlife.

Increase the emphasis on water quality as well as quantity in regional land acquisition priorities, including but not limited to protecting headwaters and preventing flooding in urban areas.

Protect and restore culturally significant native plant communities.

Prioritize protection and restoration of culturally significant native plants in partnership with greater Portland's Indigenous community in regional land acquisition and management plans.

Protect, connect and improve habitat for native fish and wildlife.

Focus on habitat protection for native fish species, such as salmon, trout, steelhead and lamprey, in regional land acquisition and management plans. Restore and enhance habitat for wildlife prioritized in state, federal and regional conservation plans and/or identified as priorities through community engagement. Consider additional opportunities for natural resource protection on working lands consistent with Metro's commitment to protect the agricultural economy and working lands in the greater Portland region.

Take care of what we have.

Maintain, update and reinvest in regional and local destinations, particularly those with high visitation and use by communities of color or places/projects identified by communities of color.

Make parks and natural areas more accessible and inclusive.

Increase access for those experiencing disabilities through investments using universal design principles and projects that comply with the Americans with Disabilities Act. Work with communities of color, greater Portland's Indigenous community and other historically marginalized groups to identify opportunities for culturally responsive public improvements.

Connect more people to the land and rivers of our region.

Provide people with new or improved access to local rivers and streams, natural areas and places for multi-generational activities, healing spaces and community gatherings. Leverage other public and private investments in affordable housing and transportation.

Invest in trails for biking and walking.

Focus on closing gaps and completing ready-to-build projects that fulfill the Regional Trails Plan, particularly those identified as priorities by communities of color. Consider proximity to affordable housing and transit and connections to regional or local parks.

Support community-led parks and nature projects.

Require greater community engagement and racial equity strategies for local, community-led projects funded by the bond. Prioritize projects identified and created by communities of color and other historically marginalized groups. Hold partners accountable for tracking outcomes and reporting impacts.

Make communities more resilient to climate change.

Reduce impacts of climate change through conservation and park development. Emphasize flood control, water quality and availability, urban forest canopy, habitat connectivity, food security and community access to water.

PART 2: LOCAL SHARE CRITERIA AND ELIGIBLE INVESTMENTS

5 LOCAL SHARE PROGRAM CRITERIA

Every program funded by this bond, including investments made through the local share program, must be shaped through meaningful community engagement and advance racial equity. Park providers should start by considering how they do or will apply community engagement and racial equity criteria and how outcomes from applying these criteria will inform project identification, selection and implementation. Demonstrating successful integration of these criteria will be a key component of project approval and overall success of the program.

5.1 COMMUNITY ENGAGEMENT AND RACIAL EQUITY

Each park provider must select and propose a portfolio of projects for local share funding with the aim of advancing racial equity in our region. All local share program investments must satisfy all six community engagement and racial equity criteria outlined in the bond legislation (See Bond Measure Exhibit A in Section 13-Additional Resources). Program Criteria 1, 2 and 4 below should influence selection and design of projects. Program Criteria 3, 5 and 6 below must guide development of each park provider's portfolio of local share-funded work.

The six criteria are:

Program Criteria 1: Meaningfully engage with communities of color, Indigenous communities, people with low incomes and other historically marginalized communities in planning, development and selection of projects (addressed in Section 5.1.1).

Program Criteria 2: Prioritize projects and needs identified by communities of color, Indigenous communities, low-income and other historically marginalized groups (addressed in Section 5.1.1).

Program Criteria 3: Demonstrate accountability for tracking outcomes and reporting impacts, particularly as they relate to communities of color, Indigenous communities, people with low incomes and other historically marginalized communities (addressed in Section 12).

Program Criteria 4: Improve the accessibility and inclusiveness of developed parks (addressed in Section 7.2.2).

Program Criteria 5: Include strategies to prevent or mitigate displacement and/or gentrification resulting from bond investments (addressed in Section 5.1.2).

Program Criteria 6: Set aspirational goals for workforce diversity and use of COBID contractors and work to reduce barriers to achieving these goals; demonstrate accountability by tracking outcomes and reporting impacts (addressed in Section 5.1.2).

Meaningful engagement is an important first step in addressing racial equity. A thoughtful, inclusive approach to community engagement lifts up and gives power to voices that have been historically silenced. Because the needs and desires of historically marginalized groups have been overlooked for so long, it makes sense that extra care be given to addressing historic inadequacies in stakeholder engagement that influences investment decisions.

With its focus on improvements to parks and natural areas, this bond also strives to advance racial equity by making public spaces safe and welcoming for historically marginalized communities. By doing so, park providers make these spaces safe for all park visitors.

5.1.1 MEANINGFUL ENGAGEMENT (PROGRAM CRITERIA 1 & 2)

Most public agencies fulfill some level of stakeholder engagement when planning publicly funded projects. Of Oregon's nineteen statewide land use planning goals, Goal One calls for "the opportunity for citizens to be involved in all phases of the planning process." *Meaningful engagement* requires that we go beyond minimums. The International Association for Public Participation, a professional organization that promotes high standards for the practice of public engagement, sets out principles for public participation as follows:

1. Those affected by a decision have a right to be involved in the decision-making process.
2. The public's contribution will influence the decision.
3. Decisions last longer when the needs and interests of all participants are recognized and communicated, including those of decision makers.
4. Those potentially affected by, or interested in, the outcome are sought after and invited to participate.
5. Participants should help design how they participate.
6. Participants are provided the information in a form they need to participate in a meaningful way.
7. Participants are informed of how their input affected the decision.

Meaningful engagement means those who hold power and authority over outcomes share that power and decision making with members of the community who are most impacted by those outcomes. It means ideas and desires are genuinely sought from those interested in a project or whose lives could be affected by, improved or negatively impacted by it. It means communication is designed to take place at the convenience of members of the community. It requires developing creative tools and new approaches that draw people into dialog and working to make the process of designing public projects relevant for regular folks. It means the contributions of those who participate in shaping and evaluating public projects are honored and put into practice where feasible. In the ideal, it means engagement is led by, and decision-making power is ceded to, the community affected by the decision.

The interests of historically marginalized groups, in particular Black and Indigenous communities and other communities of color, have been largely absent from public project deliberations and members of these groups have had limited opportunity to influence outcomes. There are a number of contributing factors. Due to historic well-documented societal actions and government policies that contributed to or sanctioned oppression, erasure, exploitation and genocide, members of historically marginalized communities have been systematically excluded from roles of influence. Oregon has a particularly troubling history of racist policies and actions. Today, these communities may be understandably distrustful, intimidated or reticent to speak out to government representatives or others in power. Traditional public engagement activities have not been structured to engage these groups. They have required people to participate at times, in processes and under circumstances that pose challenges for groups that already lack access to these opportunities. Yet plans benefit from ideas and scrutiny from the widest possible swath of the community. When specific groups or demographic sectors are excluded,

intentionally or not, resulting public projects likely will not serve the needs of those groups or sectors and may lack the color and creativity that would come from broader contributions.

The aim of this bond is to address that historic wrong through deliberate efforts to engage representatives from these groups in a thoughtful and empathetic way, on their terms. By so doing, Metro and partners will open opportunities for people from across the region, from all backgrounds and walks of life, to help shape the features of their communities, to help all members of the community connect with nature close to home, and to make parks and natural areas more welcoming and accessible.

It is anticipated that, if this effort is successful, Black and Indigenous communities, other communities of color, people with low incomes and other historically marginalized communities will have decision-making influence, see how they have directly impacted project outcomes and feel parks were built for them. Black, Indigenous, immigrant and other communities of color will find space for cultural needs and practices. They will see their identities and values reflected in park site selection, design, interpretation and care over time.

LOCAL SHARE ENGAGEMENT EXPECTATIONS

Metro will hold park providers accountable for meaningfully engaging communities of color and other historically marginalized communities and for reporting to Metro how this engagement determined local share priorities, implementation strategies and project impacts. Metro will work with each park provider to consider current efforts and, where needed, identify opportunities to expand and enhance engagement to meet bond requirements.

As park providers consider their engagement with historically marginalized communities, it should be noted that federally- and state-recognized Indian Tribes are sovereign nations and engagement between each city and county and the federally- and state-recognized Tribes with treaty rights to lands and waters within the metro area constitutes government-to-government engagement, as distinguished from interactions with other stakeholders and community groups. There are also community-based organizations representing urban Indigenous communities. Engagement with these community-based organizations, while important and valuable, does not constitute or take the place of formal discussions with the Tribes. Metro is building more formalized relationships with each of the recognized Tribes with historic ties to this region and will share information and insights with park providers as these relationships develop.

As park providers consider how best to meet the needs and desires of historically marginalized communities, the 2019-2023 Oregon Statewide Comprehensive Outdoor Recreation Plan (SCORP) (See Section 13-Additional Resources) may prove a useful beginning technical resource. The only recent region-wide survey on the topic of outdoor recreation that used statistically valid sample sizes for different racial, ethnic, age and income groups, it identified relative popularity of and demand for various outdoor recreation activities and opportunities among these groups.

See Sections 10.2, 11.1 and 12 below for more specific direction on how to meet engagement requirements and track outcomes (Program Criteria 3).

5.1.2 ECONOMIC EQUITY (PROGRAM CRITERIA 6)

The bond creates an opportunity to promote shared economic prosperity throughout the region by ensuring the participation of underrepresented workers and contractors on capital projects. It is Metro's goal to work with partner agencies to advance concrete strategies to support female and people of color workers and contractors on bond-funded capital projects. These goals are in alignment with Metro's [Strategic Plan to Advance Racial Equity, Diversity and Inclusion](#) and the Metro Council-adopted [Construction Career Pathways Regional Framework](#).

This bond measure also requires that bond funds be used to advance racial equity by establishing aspirational goals for equity in contracting and contractor workforce diversity. Metro recognizes that each park provider will be starting from a different place and wants to ensure that goals push the boundaries of current processes but are still achievable.

Diversifying the construction industry is a key strategy for addressing the region's shortage of skilled workers in the construction workforce. If left unaddressed, this shortage will drive up construction costs for decades to come. This bond invests in our collective ability to address these shortages and expand access to well-paying construction jobs for all residents, including women and people of color. Through these efforts, we can strengthen our regional economy and avoid higher construction costs for public projects over time. Metro will work with park providers to incorporate strategies to advance contracting equity and contractor and subcontractor workforce diversity into intergovernmental agreements ("IGAs") as described below.

LOCAL SHARE CONTRACTING EXPECTATIONS

Local partners that have existing policies that align with the Construction Career Pathways Regional Framework and established utilization goals for contractors certified by Oregon's Certification Office for Business Inclusion and Diversity (COBID) should apply those policies and goals to bond-funded projects. Policies that align with the Construction Career Pathways Regional Framework are those that identify a level of project cost for which diversity goals will be applied, in which workforce diversity will be tracked, respectful workplace training will be provided and workforce agreements will be put into practice. Policies that promote the utilization of COBID certified firms are those that establish aspirational goals and tracking systems for the utilization of people of color- and women-owned firms as well as other firms that qualify under the state COBID program.

For park providers that do not have existing policies, Metro will work with partners to rightsize the Construction Career Pathways Regional Framework and equity-in-contracting strategies to accommodate their organization's individual capacity while also advancing equity goals. Through joint discussions between Metro and park provider staff, Metro will develop thresholds based on total project cost and other factors to guide which components of the Construction Career Pathways Regional Framework must be implemented, including workforce diversity tracking, application of workforce diversity goals, respectful workplaces training and utilization of workforce agreements. Goals will be established prior to development of IGAs and documented in each park provider's IGA.

Metro recognizes that this is a new approach for some local governments in the region. The goal is to create a pathway for agencies to build the capacity and infrastructure to advance workforce and equity-in-contracting strategies. In order to support agencies in implementing the agreed-upon strategies, Metro expects to provide technical assistance which may include support in collecting and tracking workforce equity data, procurement strategies that advance workforce diversity and implementation of

respectful workplace training (See Section 11). Metro will also work with park providers to identify utilization goals for certified contractors.

Tracking workforce diversity is a key component of implementing workforce and contracting equity strategies. Metro will work with park providers to identify specific tracking tools and agreements on data sharing and reporting requirements (See Section 12).

The COBID system offers what is currently the best option available for identifying and attracting businesses owned by minorities, women and service-disabled veterans. Park providers should set aspirational goals, some of which could be assistance to contractors versus utilization targets. Park providers should seek contractors through this system while also documenting efforts to help reduce contractors' barriers to certification and support success of certified firms. Because of the constraints of the current system, this may require effort and creativity. For example, park providers might identify specific COBID-eligible firms and assist them in gaining certification or engage with minority-focused chambers of commerce or circulate notification of upcoming projects to community-based organizations that support historically marginalized communities. It is helpful for procurement managers across the region to share resources and approaches. Metro anticipates holding roundtables where park providers and procurement staff can share ideas, techniques and lessons learned.

5.2 SUPPORTING RESILIENT COMMUNITIES (PROGRAM CRITERIA 5)

New parks add so much to neighborhoods and communities. Trees, flowers, pathways and areas to socialize and exercise connect people to nature and boost the livability of neighborhoods. But that can come at the price of equity. When parks and trails are built or improved in historically marginalized areas, ostensibly to serve the local residents, the surrounding neighborhood may see higher housing prices and rent increases. The term "green gentrification" is used to describe this process of housing price increases and influxes of new, wealthier and often white residents in low-income communities of color. Research indicates the threat is real in many cities and can lead to displacement of longtime residents and businesses.

Generally, this is not an issue that parks departments and districts can solve alone. To avoid displacement from gentrification, communities need to identify strategies and implement policies, ideally well in advance of the addition of new amenities such as parks. Local governments have the authority and are best equipped to address this issue holistically through a mixture of policies that keep housing affordable and support better paying jobs, implemented in conjunction with plans for new or improved parks. Ideally, public agencies should work with community-based organizations to identify anti-displacement strategies for areas surrounding parks, trails and natural areas in advance of improvements.

LOCAL SHARE COMMUNITY RESILIENCY EXPECTATIONS

How do you improve access to parks and natural areas but not contribute to this shift in property values and land uses that has potential to detrimentally affect a community?

A few recommendations:

- Projects should reflect the scale, context and needs of the surrounding community. Park improvements should serve the needs of the existing community while maintaining or enhancing

its culture and character. This is just one more compelling reason to plan parks in consultation with residents and culturally-focused community-based organizations. Equitably engage community in selecting park, nature and trail projects. Encourage participation of those who may be impacted by parks and nature investments. Prioritize the voices of those who have been traditionally underrepresented.

- Community engagement with local residents and community-based organizations can help raise the local governments' understanding of challenges residents face and the opportunities for solutions. Assist in the growth of partnerships that can create alliances, identify mutual goals and values, identify financial support, and build relationships with community ambassadors.
- Designing parks and developing displacement-avoidance strategies should go hand in hand and involve collaboration between park, employment and housing organizations.
- Combine the creation and preservation of affordable housing with initiatives to create better paying jobs for local residents. Partner with workforce development agencies and programs to develop job skills within the community around investment areas. Protect locally-owned small businesses through direct contracting with COBID certified businesses.
- Integrate displacement avoidance into policies, laws and funding measures as was done with this bond. Anti-displacement housing- and land-use policies include: inclusionary zoning, density bonuses, developer impact fees, rent control. Support programs that make it easier for low-income homeowners and renters to stay in place: anti-eviction protections, renter education workshops, and property tax freezes or down-payment assistance for low-income homeowners.
- Share successes and failures with colleagues across the region to learn collectively which practices are most effective.

Park providers should be prepared to describe measures their community is taking to prevent gentrification and displacement, particularly as it relates to bond-funded, capital projects. Metro is developing additional anti-displacement direction for all six bond programs and will share results when available.

6 ELIGIBLE LOCAL SHARE INVESTMENTS

The bond measure identified the following five types of capital investments as eligible for local share funding.

6.1 NATURAL AREA OR PARK LAND ACQUISITION

Land acquisition includes the purchase (fee title or easements) of regionally or locally-determined significant natural areas, wildlife habitat, trail corridors, neighborhood or community parks, and out-of-pocket capital costs associated with property acquisition. "Stabilization" of newly acquired lands may also be a permissible capital expense and consists of the initial actions exercised after the purchase of a property, typically completed within five years, required to put the property into the condition for which it was purchased. Stabilization activities are often the first steps toward meaningful fish and wildlife habitat enhancement and may include preventing further degradation of natural resource values, vegetation management, tree and shrub planting, replacement, installation or removal of structures such as culverts, gates or fences, protecting property security

and minimizing health and safety risks. Each park provider must determine which acquisition and stabilization-related expenses constitute capital costs based on its financial policies and in compliance with state laws. Land banking, defined as acquiring property for a future use, is also permissible. Notwithstanding the forgoing, all properties purchased with bond funds must be maintained for their intended natural area, wildlife habitat, water quality, trail or recreation purpose.

Agreements for local park providers to acquire any interest in land must be negotiated with willing sellers only and local park providers may not exercise their powers of eminent domain in the implementation of this bond measure. Metro has some limited technical assistance capacity available to assist local park providers with real estate transactions (see Section 11.3). For all land acquisitions, park providers must perform a commercially reasonable level of due diligence, as determined by Metro (including, but not limited to, title reviews and environmental assessments) to confirm there are no material restrictions or issues that would impede the park provider's use of the land in accordance with the intent of the bond and applicable bond criteria. In addition, park providers must obtain an appraisal for each land acquisition to ensure bond funds are being used to acquire property at fair market value.

As referenced above, land acquisition costs that may be paid for with bond funds include the purchase price and all capital costs related to pre-purchase due diligence including appraisals, purchase of options, earnest money for purchase and sale agreements, environmental assessments, and other third-party reports. Metro intends to provide local partners with purchase funds prior to closing, while other due diligence costs will be on a reimbursement basis. The details of funding will be addressed in each provider's IGA.

The bond measure provides for property and trail acquisition funds through two other bond programs, and local park providers should be aware of how these interrelate with local share funding.

- Within the Protect and Restore Land program (formerly referred to in the 2006 bond as "regional share") there are several land acquisition target areas, including the urban target area, that overlap with the jurisdictions of local park providers. Metro encourages partnership through the acquisition and management of properties in local park providers' jurisdictions, and park providers should consider coordinating their proposed land acquisition projects with Metro's land acquisition staff to leverage expertise and funds in the most meaningful way. Local park providers should note that funds from the Protect and Restore Land program are intended to be used to purchase and restore regionally significant fish and wildlife habitat and not to backfill local priorities that are not funded through local share such as pocket or neighborhood parks.
- As outlined in Section 6.4 below, the Create Trails for Walking and Biking program includes approximately \$10 million for acquisition of property for trail easements to fill gaps in regional trail corridors. In past years, this has been funded through the "regional share" program of the bond. As in previous years, Metro intends to continue to negotiate purchase agreements to acquire trail corridors on behalf of local partners and convey these property rights to local park providers at closing. This arrangement will be documented through separate IGAs.

6.2 FISH AND WILDLIFE HABITAT RESTORATION, HABITAT CONNECTIVITY ENHANCEMENTS

Habitat restoration or enhancement can greatly increase the value of existing or newly protected land in providing connectivity, fish and wildlife habitat, water quality and human enjoyment. This is equally or especially true in the more urbanized portions of our region where natural habitat is scarcer, land is more expensive, the human footprint is larger and many more barriers to connectivity exist than in more rural areas. Often, if done thoughtfully, improvements can be incorporated into public access projects, creating important co-benefits. In some cases, restoration may be the only option to bring nature to neighborhoods that are truly nature deficient.

During creation of the bond measure, stakeholders identified several priorities for habitats and species of concern, including: a focus on water quality and quantity; headwaters, wetlands and floodplains; prairie, savanna and oak; habitat for salmon, steelhead, trout and lamprey and species prioritized by the Indigenous community as well as those identified in federal, state and regional prioritizations.

Many of the same types of actions that improve fish and wildlife habitat and increase scenic beauty are also key to improving our region's resilience to a changing climate for nature and people. Restoring and reconnecting headwaters, wetlands and floodplains improves absorption of rainwater, reduces flooding, lowers water temperature and enhances late-season flow, benefiting fish and water users alike. Increased shade cools water and reduces the urban heat island effect. Better connected habitat not only supports healthier fish, wildlife and native plant populations, but allows nature to better adapt to a changing climate without expensive human intervention.

Habitat enhancement work can also be a path to providing economic and stewardship opportunities to Black, Indigenous and other people of color and other historically marginalized communities. Ensuring such benefits do in fact accrue is a focus of this bond measure and requires thoughtful crafting and execution of requests for proposals and bids and similar work that turn restoration ideas into reality. In some cases, investment in restoration and enhancement can provide more economic benefits to historically marginalized communities than land protection due to existing inequities in land ownership.

Bond investments are however, limited to capital projects. While many restoration efforts, such as stabilization, dam removal, floodplain levee de-construction, replacement of culverts with bridges; and placement of large wood in streams could be considered "capital" under a local park provider's capital policy, other efforts, including ongoing maintenance and general operations would not be considered capital and therefore cannot be paid for with bond funds. Each local park provider receiving bond funds must comply with its own capital accounting policies and confer with local finance staff to determine whether proposed project-related costs are capital and thus eligible for funding.

6.3 MAINTAINING OR DEVELOPING PUBLIC ACCESS FACILITIES AT PUBLIC PARKS AND NATURAL AREAS

Well designed and constructed public access facilities make parks more welcoming, safer and more enjoyable. They should enhance visitors' connection to nature. These facilities can vary considerably and should be designed with consideration for anticipated future volume of visitation and the intended park or natural area experience. Facilities at less developed sites might include trailheads, natural soft surface trails and benches at key locations. Sites that receive large numbers of visitors might benefit from restrooms, parking at the trailhead and some hard trail surfaces. On sites that include water features such as wetlands, creeks or lakes, extra effort should be made to provide visitors with safe, meaningful and enjoyable access. Depending on the site and the fragility of the natural feature, this might mean

providing overlooks, boardwalks and viewpoints or wading areas and paddle launches. Parks and natural areas provide sites for community and family gatherings. This use can be supported with facilities such as picnic shelters. Community gardens provide a different kind of access. They facilitate hands-on engagement with nature, open opportunity for social interaction and education and support climate resilience by expanding access to fresh food and serving as stepping stone pollinator habitat. While this bond measure can fund a variety of access facilities, the stated purpose of the bond measure is to protect nature and provide people access to nature. As such, bond funds may not be used to fund sports facilities, including but not limited to basketball courts and swimming pools.

6.4 DESIGN AND CONSTRUCTION OF LOCAL OR REGIONAL TRAILS

The bond measure includes a \$40 million program to “create trails for walking and biking.” It will invest in regional trails, with up to \$10 million allocated for willing-seller easements and property acquisitions to be led by Metro, as referenced in Section 6.1. The program also includes a competitive grant program which will award funds to local agencies for regional trail planning, design and construction.

Local share funds can also be applied to trail projects but with greater flexibility. Trail program funds are limited to projects already identified on Metro’s regional trails system plan map. These “regional” trails typically connect multiple cities, are wide, paved, and are designed with bicycles in mind. Similarly, local share funds can be used for regional trails (e.g. a segment of a waterfront greenway that forms part of a longer trail connecting other communities), however they can also be used to fund trails that are not regional in scale. These include local in-park trails or any trails that offer people a way to experience nature close to home. Examples include a new bridge over a creek in a local natural area or a new mountain bike trail network within a local park. Trailhead amenities are also eligible for local share funding. Local share-funded trails do not have restrictions on length, width, surface material or user type (such as bicyclists or pedestrians) as long as they are consistent with ADA guidance.

Park providers who invest local share funds in construction of trails, trail segments and trailhead amenities are responsible for ongoing management of these facilities including costs associated with maintaining and renewing or replacing them. New wayfinding signage along regional trails must follow the [Intertwine Regional Trails Signage Guidelines](#).

6.5 ENHANCED OR NEW LEARNING/ENVIRONMENTAL EDUCATIONAL FACILITIES

Offering visitors information and insights about the natural and cultural history of a site helps deepen their experience and sense of connection. Information about nature can be shared with visitors in a variety of ways. *Interpretation* is a communication process that supports development of emotional and intellectual connections between the interests of the audience and the meanings of the site and its features and history. It involves translating technical language into terms and ideas that people who don’t have technical knowledge can readily understand and it provides opportunity for the audience to form their own intellectual and emotional connections with the place and its features. It can take place anywhere and tends to make use of signs, videos, kiosks, art and presentations. *Environmental or nature education* is more of a curriculum-based structured program offered in a specific setting to students over a longer period of time. Often its goals and specific learning objectives are tied to a state’s learning standards. Environmental education facilities may include classrooms, labs, presentation settings and designated outdoor sites equipped for learning specific objectives such as outdoor learning laboratories and outdoor museums.

Both interpretive and environmental education facilities qualify for local share investment. The

investments must be capital. If a proposed facility will be shared for other uses such as meeting space or outdoor equipment rentals, local share should fund the percentage of the facility budget focused on nature education and connection. Kiosks, displays and interpretive signs must be designed using ADA access standards, with attention to cultural perspectives and for a variety of learning styles and sensory capabilities. Signs should be accessible to people of different ages and heights and to people in wheelchairs.

7 LOCAL SHARE PROJECT-SPECIFIC CRITERIA

In addition to satisfying required community engagement and racial equity program criteria described above, each project proposed for local share funding must meet at least one of the climate resiliency criteria below as well as at least one of the additional project-specific criteria below. These criteria intertwine and park providers are encouraged to identify projects that meet multiple criteria.

7.1 CLIMATE RESILIENCY CRITERIA

7.1.1 REDUCE IMPACTS OF CLIMATE CHANGE THROUGH CONSERVATION AND PARK DEVELOPMENT.

We are witnessing effects of climate change in more extreme wildfires and weather events that threaten our biological and human communities. In response to guidance from climate scientists and climate modeling for the Pacific Northwest, we must anticipate hotter, drier and longer summers, winter rains that come in fewer but stronger storms, a reduced snowpack and, in general, more volatile weather.

While Metro and partners work to systematically reduce our collective impact on the earth's climate, we need to take steps to adapt to the anticipated changes we will face in our own communities in the intervening years. *Climate resilience* is the capability to anticipate, prepare for, respond to, and recover from significant threats with minimum damage to social well-being, the economy, and the environment. Climate scientists are in overwhelming agreement that the fundamental approach to increasing landscape-scale resilience in our natural ecosystems is having a connected network of well-managed natural areas that enable systems and species to self-adapt to climate change.

This bond measure identifies a variety of avenues for parks and natural areas to help buffer the effects of climate change, helping protect both our ecological systems and our built environment. Many actions supporting climate resilience provide multiple benefits that help meet other regional objectives also identified in this bond. Land protection provides opportunities to improve and connect habitat, and provide access for people. Native plantings in parks provide habitat while also saving water by reducing need for supplemental summer irrigation. Protection of wetlands and riparian areas also can help connect people to the waterways of the region and serve as low-impact flood storage. Trails used for human transportation, if located and designed well, may also serve as wildlife corridors allowing species to migrate as needed. Pollinator gardens and bird-friendly plantings provide “stepping stone” habitat for these flying species while providing wildlife viewing and educational opportunities for park visitors. Community gardens provide gardeners an intimate connection to living

organisms while contributing to food security. Thus, holistic designs can result in multiple benefits within the same project.

Every project funded by the bond must satisfy at least one of the following climate resilience criteria (See Bond Measure Exhibit A in Section 13–Additional Resources):

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

Metro is developing climate resilience direction for other programs funded by this bond. More information will be shared with park providers as it becomes available. If desired, Metro will provide more specific direction and guidance on methods to meet climate resiliency criteria on a case-by-case basis and encourages park providers to explore options that serve the unique needs of their communities.

7.2 ADDITIONAL PROJECT-SPECIFIC CRITERIA

7.2.1 IMPROVE CRITICAL CAPITAL INFRASTRUCTURE TO ENSURE THAT PARKS ARE SAFE AND WELCOMING.

During development of the bond measure, stakeholders stated their desire that the region take care of what we have before building new park improvements. Park providers should consider this feedback when selecting capital projects. Taking care of what we already have can be interpreted as investments in capital upgrades, or replacement of existing infrastructure to increase durability, efficiency and effectiveness. Metro recommends park providers prioritize replacement of dysfunctional infrastructure that poses a threat to visitor safety. This might mean addressing water access facilities, road or trail surfaces, staircases, railings, accessibility updates, etc. Lighting and strategically-located visibility can also help visitors feel safe. Improvements should be low impact and enhance, but not harm, water quality, wildlife and fish habitat and should not reduce the ability of park users to connect with nature.

7.2.2 IMPROVE ACCESSIBILITY AND INCLUSIVENESS OF DEVELOPED PARKS. (PROGRAM CRITERIA 4)

While a well-built and well-maintained park can help convey a sense of safety to visitors, it is important that park managers consider other, perhaps less immediately tangible features of a park that may

influence visitors' sense of safety. These may include the choice of who is honored in the park's name and how the site is interpreted. Consultation with Black and Indigenous communities and other communities of color during park planning will help identify and address some of these culturally-specific concerns that influence visitor's sense of safety. Any signage, interpretation, access points, art and other improvements should reflect the values and needs of the community, including historically marginalized groups, so that members of the community feel the park was built for their use and they are welcome.

Cultural access and inclusiveness can be achieved by providing a variety of outdoor experiences and settings, as identified through consultation with historically marginalized communities, where all visitors have choices for how they use park facilities and connect to nature. Efforts should be made to eliminate travel challenges and financial costs as barriers to experiencing nature. Projects should ensure that people of color, Indigenous people, people with disabilities and other marginalized communities feel that parks and their amenities are shaped by and for them.

Developed parks should be accessible to people of all abilities and inclusive to people of all backgrounds, cultures and means. At a minimum, capital projects funded by local share must meet applicable federal Americans with Disabilities Act ("ADA") standards and state accessibility standards (see Oregon Structural Specialty Code). It is quite common that projects designed to meet these minimum standards miss the mark in execution. For this reason, Metro recommends extra care and scrutiny at all stages of a project, from scoping through project close-out. Reliance on the promise of well-intentioned designers, contractors, and permitting agencies for whom achieving ADA compliance is not a first priority has resulted in many inaccessible experiences for people experiencing disabilities. Ongoing care and stewardship of capital projects so that they continue meeting or exceeding accessibility standards is an important element of maintaining an accessible environment.

Metro also recommends that parks and natural areas designed for public enjoyment meet the federal [Guidelines for Outdoor Developed Areas](#). Applying this detailed design guidance, mandatory for federal land agencies and projects that receive federal funding, is considered best practice for local jurisdictions and others. In the years to come, it is anticipated that these guidelines will become requirements for Metro and local jurisdictions as well.

In addition, community members living with a disability have asked Metro to provide better information about the accessibility of its sites. This includes information the agency provides online to help visitors plan their experience, as well as information available onsite upon arrival. Providing information that empowers individuals to make their own determination of what is accessible for themselves is the key. Models, examples and resources exist. Access Recreation, a local community-based project, has developed [Guidelines for Providing Trail Information for People with Disabilities](#) and has demonstrated their application through the [Access Trails Project](#).

Various resources exist to support implementation of accessible parks, trails and natural areas projects. Metro can provide resources, initial scoping assistance and high-level project consultation on a project-by-project basis.

7.2.3 PROVIDE CULTURALLY RESPONSIVE PUBLIC IMPROVEMENTS AS IDENTIFIED BY GREATER PORTLAND'S INDIGENOUS COMMUNITY AND/OR COMMUNITIES OF COLOR.

New or upgraded capital projects must be planned and developed with knowledge and sensitivity, in consultation with historically marginalized communities. Cultural representation in developed parks and natural areas should be shaped by representative members of the cultural community in focus.

Interpretive features and information about the improvements should be presented in the languages of the people of that culture and community members should see themselves accurately reflected in the stories told through park design and interpretation. Projects should support park use preferences expressed by Black, Indigenous and communities of color so that cultural practices can be observed and shared in a variety of safe and welcoming settings. Park providers are encouraged to explore opportunities to collaborate with federally- and state-recognized Tribes with historic ties to the region as well as local Indigenous communities to identify land for protection that can support native culturally significant plants and animals.

7.2.4 IMPROVE THE VISITOR EXPERIENCE BY INVESTING IN NEW OR EXISTING PARK AMENITIES.

Park amenities are the elements of park construction that accommodate visitor activities and enrich the visitor experience. They may include, but are not limited to, benches, picnic tables, shelters, educational or interpretive displays, bike racks, lighting, restrooms, trails, trailheads, boat docs, boardwalks and playgrounds. To qualify for local share funding, new or upgraded amenities must help connect people to nature. They must meet universal design principles. They should be low-impact and enhance, not harm, water quality, fish and wildlife habitat or the ability of park users to connect with nature. Amenities should be identified and designed in consultation with stakeholders, specifically communities of color and people with disabilities. The intent is to create a variety of nature experiences close to home where communities, especially historically marginalized communities, are able to safely and confidently connect with nature in their desired way and they should support pursuit of mental, spiritual and physical health and cultural healing.

7.2.5 IMPROVE ACCESS TO NATURE FOR LOCAL COMMUNITIES IDENTIFIED AS “NATURE-DEFICIENT.”

Metro is developing greater definition of nature deficiency and direction on addressing it for all six bond programs and will share the results of that work when it becomes available.

7.2.6 IMPROVE THE EFFICIENCY AND EFFECTIVENESS OF OPERATIONS AND MAINTENANCE OF DEVELOPED PARKS.

Taking care of what we already have starts with design and choosing materials, surfaces, placement and other features for durability and efficiency of maintenance. Local share capital projects should be thoughtfully designed to lower resource use and contribute financial savings over each project’s lifespan. This honors the investments made by our community. Toward this end, Metro recommends that local partner maintenance and operations staff are consulted during project selection, design and development processes. Efficient and effective operations and maintenance not only ensure cost savings but also contribute to better working conditions for park staff and increased worker satisfaction. Note that costs for operations and maintenance on their own are not considered “capital costs” and therefore not eligible for bond funding.

7.2.7 PROVIDE NEW OR EXPANDED ACCESS TO NATURE, PARTICULARLY IN PROXIMITY TO NEIGHBORHOODS, CENTERS, CORRIDORS OR TRANSIT.

Connecting people to nature is a primary goal of the bond measure and park providers should consider

this as an element of projects funded by the local share program. To address nature deficiency in historically marginalized communities, opportunities for discovery and ease of access are key elements. People should be able to experience nature close to home, accessed through a variety of modes of transportation. To the extent possible, parks and natural areas should be located in areas where they are most needed and where they will enhance community life. This will require coordination and collaborative partnerships with urban planners and community representatives to create a more holistic approach to removing barriers to access.

7.2.8 IMPROVE ACCESS TO WATER WITH SCENIC AND/OR RECREATIONAL OPPORTUNITIES.

Water is not only a primary human need but also a significant element of many cultural and spiritual practices. During development of the bond, stakeholders, in particular members of the metro-area Indigenous community, expressed a desire to experience a closer connection to water. Park providers should consider investing local share funds in new or upgraded capital infrastructure that honors the broader community's stated desire. This opens opportunities to consult with historically marginalized communities on ways to recognize water's cultural and spiritual significance and healing powers. Creating stronger connections to water also offers opportunities for communities to bolster appreciation of the importance of keeping water clean and abundant and the importance of water to wildlife while also addressing community safety.

7.2.9 ACQUIRE LAND THAT COULD PROVIDE FUTURE ACCESS TO NATURE FOR PEOPLE, SCENIC VIEWS, AND COMMUNITY GATHERING SPACES.

Land acquisition is an excellent use of local share funds. Park providers should give thought to protecting special places like river and stream banks, headwaters, floodplains, wetlands, oak and prairie habitat, forests, and culturally significant sites as they consider climate resilience and connecting people to nature. Authentic engagement with community to identify priorities will be critical, especially in areas with populations of historically marginalized people who lack parks or natural areas in proximity to their neighborhoods or that can be easily accessed by transit. Land purchased for trail routes and resource protections, such as riparian zones, can also serve as wildlife corridors, greatly expanding habitat and supporting wildlife movement in a changing climate. Partnership or collaboration with Indigenous communities and Tribal governments is encouraged and can lead to protection of key sensitive or culturally significant sites and plant communities.

7.2.10 PROTECT AND IMPROVE WATER QUALITY AND QUANTITY, WITH AN EMPHASIS ON HEADWATERS, WETLANDS, FLOODPLAINS, RIPARIAN AREAS.

Park providers should consider using local share funds to purchase and restore land that protects headwaters, river and stream riparian areas, water bodies, wetlands and confluences. This can help keep these critical features of a healthy watershed ecologically intact and functioning in order to provide habitat, ecological services and climate resilience such as recharging groundwater and flood control. This also opens opportunities to connect people with nature via the waters of their communities—a desire expressed by stakeholders when developing this bond measure.

PART 3: RESPONSIBILITIES, PROJECT PROPOSALS AND FUNDING

8 RESPONSIBILITIES OF METRO AND PARK PROVIDERS

The local share program is guided by regional goals and oversight by Metro and implemented by local park providers. Metro and the city, county and district park providers must work together to ensure that bond-driven actions and investments advance desired regional outcomes that honor the commitments made to the region's voters.

8.1 METRO

The Metro Council provides policy direction for the local share program through approval of an IGA template and monitoring of program implementation and outcomes, with input from the Community Oversight Committee described in Section 8.2 below.

The Metro Chief Operating Officer ("COO") will direct Metro's Parks and Nature staff to administer the local share program and work in partnership with local park provider staff to identify, screen, and support alignment of projects for local share funding. Metro staff will process and approve requests for release of local share allocations to local providers and will provide technical support, to be further described in an IGA.

8.2 COMMUNITY OVERSIGHT COMMITTEE

An independent [community advisory committee](#), initially appointed by the Metro Council in March of 2021, will help assure the implementation of all six bond programs over the duration of the bond in accordance with promises made to voters. Among other responsibilities, this community oversight committee will provide an independent, outside review of implementation of the local share program, including efforts to meet the meaningful stakeholder engagement, racial equity and climate resiliency criteria and outcomes described in the bond. Their role will be to review the previous year's accomplishments and make recommendations for programmatic improvements rather than to weigh in on approval of park providers' projects.

8.3 PARK PROVIDERS

The local share program provides funding to the 27 cities, counties and park districts identified in the bond measure as park providers. To be eligible to receive Metro bond measure funds, park providers must:

- A. Identify qualifying projects that meet local share program criteria, that have been prioritized and shaped through meaningful stakeholder engagement and include a strategy for advancing racial equity.
- B. Integrate features into local share projects that help make the recipient's community or area of the region more resilient to effects of climate change;
- C. Design projects to meet at least one of the local share project-specific criteria; and
- D. Comply with all terms of an IGA with Metro obligating the local park provider to, among other things, provide funding reports, project updates, contract utilization figures and generally

comply with the bond measure, this local share handbook and applicable law.

Park providers are responsible for stakeholder engagement, project management, leveraging additional funds and for ownership, operations, management and liability responsibilities for completed projects.

9 DISTRIBUTION OF FUNDS

9.1 ALLOCATION OF LOCAL SHARE FUNDS

Allocation of local share funds was defined in the bond measure based on population within each provider's boundary. The population numbers were generated in December 2018 by the Metro Research Center using data from the American Community Survey along with methodology they developed for estimating population for custom, non-census geographies.

The local share allocation uses a two-step formula. The first step allocates the total local share amount to the three metro-area counties based on assessed value. Clackamas =21.85%; Multnomah = 42.76%; Washington = 35.39%. The second step allocates the amounts within the counties to park providers based on population using the latest population estimates from Portland State University as well as analysis for overlapping jurisdictions such as park districts. The formula also sets a base allocation (\$200k) for cities in the bottom quartile in population.

These funds are available to each of the identified park providers for projects deemed by Metro to meet the local share criteria. Program funds will be committed and disbursed on a project-by-project basis following execution of IGAs. Distribution of bond funds will be conditioned on a park providers' ongoing demonstration of progress as presented through regular staff-to-staff conferences, quarterly updates and an annual financial report and progress summary as stipulated in each IGA (see Section 10).

Funds from the bond measure should not be used to replace local funding. There is not a requirement that recipients demonstrate an explicit percentage match, however park providers must provide information on how the local share bond funds were leveraged to obtain non-bond funds or a rationale for why leveraging additional funding was not possible. Recipients must demonstrate a good faith effort to draw in additional sources of funding.

The bond funds are available to each park provider for 10 years from the date an IGA is signed. Metro Council at its discretion may allow one additional two-year extension.

9.2 ELIGIBLE CAPITAL COSTS

The local share program is funded using tax-exempt general obligation bond proceeds. As such, the bond funds may only be used to pay for expenditures that constitute qualified capital costs, consistent with the Oregon Constitution and federal tax law. Capital costs are costs that are considered capital under generally accepted accounting principles (GAAP) and may include the costs of capital construction, capital improvements and land acquisition. Capital costs do not include costs of routine maintenance, supplies or general operating expenses. Each park provider must, based on its own financial and accounting policies, ensure that bond funds received are only used to pay for capital costs

9.3 10% CAP ON STAFF, OVERHEAD, AND INDIRECT PROJECT COSTS

Local share bond funds may not be used to pay for staff, overhead, and indirect project costs that exceed 10% of the cost of any project. A comprehensive list of costs subject to the 10% cap is being compiled by

Metro and will be provided to each local park provider. The 10% cap will be applied on a project-by-project basis and each park provider will be responsible for tracking and accounting for its costs to ensure compliance with the 10% cap.

9.4 BUDGETING

Each park provider will be required to submit a project budget with each project proposal. The project budget submitted must outline the total project cost summarized by major spending category and must include whether each line is a direct project cost or an administrative capital cost. The park provider should prepare project scopes and budgets with care, applying conservative estimates. A percentage of project budget must be set aside as contingency to cover unforeseen expenses. The amount of contingency should be based on each park provider's standard project management practices. It is anticipated that project budgets will be best estimates and construction costs will likely fluctuate over the life of each IGA. If projects are completed under budget, park providers may apply the savings to other local share projects. If projects are completed over budget, Metro does not have additional funds to cover added expenses or project budget overages, so the park providers will be required to cover the overage. Alternatively, it would be permissible for a park provider to apply remaining local share allocation (i.e., unused funds from other projects not yet underway) to the overage, which would lower available funds for subsequent projects. Otherwise, budget overages are the responsibility of the park provider.

10 PROJECT PROPOSAL AND APPROVAL

10.1 STEPS FROM PROJECT SUBMITTAL TO APPROVAL

- A. Initial contact by park provider with Metro staff;
- B. Meeting(s) between park provider and Metro staff to consider potential projects.
- C. Metro staff and park provider visit project sites as appropriate and explore project options.
- D. Park provider fulfills any unmet requirements to meet bond criteria, as determined in consultation with Metro staff.
- E. Park provider fine tunes proposed projects in collaboration with Metro staff.
- F. Park provider and Metro staff reach preliminary agreement on a single proposed project or portfolio of proposed projects.
- G. Metro works with park provider to establish equity in contracting goals.
- H. Park provider completes and sends submittal package (see Section 10.2).
- I. Metro staff reviews and approves submittal package or requires adjustments;
- J. Metro staff works with park provider to establish aspirational goals in support of Construction Career Pathways Regional Framework.
- K. Park provider seeks and receives approval for single proposed projects or project portfolio from park provider's governing body at a public meeting. The setting is at the discretion of each park provider but should be based on its standard process for approval of investments in park projects.

- L. Metro and each park provider negotiate an IGA identifying an approved list of local share projects stipulating the conditions under which bond funds will be released.
- M. Park provider's governing body and Metro approve IGA.

10.2 PROJECT SUBMITTAL PACKAGE

Prior to execution of the local share IGA, a park provider must submit a completed package that describes how their project or portfolio of projects meets bond criteria. The submittal package must include the following components:

- A. Description of each project, its intent and its benefit to the community.
- B. Each project location, site or facility attributes, where appropriate.
- C. Stabilization plan for land acquisitions, as appropriate.
- D. Each project scope of work and timeline.
- E. Each project budget including contingency, funding breakdown between local share funds and any other funding sources acquired.
- F. Each project's budget narrative, describing the budget, explaining how local share funding is being used and how it is leveraging other sources. If not leveraging, explain why.
- G. Description of how the projects were selected and prioritized through meaningful community engagement, specifically with historically marginalized communities. If engagement plan was developed, include.
- H. Description of how continued engagement will influence project planning, implementation and impacts.
- I. Description of how each project will meet equity in contracting criteria including, where appropriate, park provider's current policies on racial equity in contracting and workforce diversity. Include agency-wide or project-specific aspirational goals for contracting with COBID-certified firms. Describe efforts made to reduce barriers. Identify any existing expectations for supporting construction career pathways (Metro will work directly with each park provider to confirm goals).
- J. Description of how each project will meet local share criteria in the bond measure and further described in this handbook
- K. Description of how park provider will track, measure and evaluate project's success at meeting bond criteria (Metro will provide guidance; see Section 12).

Metro will provide a submittal package form, including self-assessments and templates for use by park providers. If provider is prepared to proceed with some projects but does not have all projects identified initially, the IGA will be amended at a later date to include additional approved projects, which will be approved in the same manner set forth in this handbook.

10.3 RELEASE OF FUNDS

Once a project or group of projects gains Metro staff approval and a local share IGA is executed by the parties, bond funds will be released to the park provider on a project-by-project basis in accordance with the terms of the IGA.

Metro anticipates release of funds may be done in stages upon completion of benchmarks as set forth below. Each IGA will fully address funding benchmarks and reporting requirements which are currently expected to reflect those set forth below.

- In the case of real property acquisition, release of funds may be made at the time of expenditure, directly to the seller through an escrow account. Out-of-pocket eligible capital costs will be reimbursed.
- Metro may, at its discretion, advance a portion of the projected budget (“Initial Advance”) for each approved project that is ready to commence. Park providers must provide proof of utilization of the Initial Advance before requesting additional reimbursement payments from the local share program. Costs eligible for reimbursement must have been incurred after Metro Council’s approval of the first bond sale on March 19, 2020.
- After using the Initial Advance, park providers will seek reimbursement for additional costs incurred in arrears. In order to seek reimbursement from Metro, park providers will be required to submit an invoice and an itemized statement of expenses for each project. Invoices will be paid on a net 30 basis. Park providers may seek reimbursement as frequently as once per quarter. At a minimum, park providers must submit a reimbursement request at least once annually for costs incurred through June 30. Those annual reimbursement requests must be received prior to July 15 each year for Metro to account for all funds it is obligated to pay in that fiscal year. Park providers who cannot meet this deadline must provide their best estimate by July 15 and follow up with a report of actual expenses as soon as possible thereafter.
- Each park provider must submit an annual progress report on July 15 each year which details the progress, successes and challenges of each approved project and the ways it has met the principles and goals outlined above and in their IGA. Metro local share staff will provide guidance on what should be included in progress reports, consult with park provider throughout the year and will make site visits as appropriate.
- Final payment will be released at the close of each project following receipt and formal acceptance of project close-out report by Metro staff. Metro staff and elected officials will be provided opportunity to attend opening ceremonies for completed facilities and the park provider will acknowledge Metro’s contribution to the completed projects through appropriate signage at project site.
- When 12 years have elapsed from the execution of an IGA, the Metro Council will reallocate unspent and unobligated funds from this local share program area to another bond program area(s), up to any maximum program funding amounts (See Bond Measure Exhibit C in Section 13–Additional Resources).

11 TECHNICAL ASSISTANCE

11.1 STAKEHOLDER ENGAGEMENT

Metro will share resources and consult with park providers on methods and techniques for meaningful engagement, specifically those methods Metro has found effective in engaging with Black and Indigenous communities and communities of color. Metro anticipates convening partners across the region periodically to share experiences and successes and collectively improve practices.

11.2 EQUITY IN CONTRACTING

Metro will consult with park providers to establish aspirational goals for equity in contracting, workforce diversity and support for construction career pathways. This will be done for approved projects in advance of development of IGAs. Metro will be available for ongoing support as projects progress.

11.3 LAND ACQUISITION

Metro's land acquisition experts value opportunities for partnering and will make themselves available as feasible to consult with park providers on acquisition efforts. Metro may provide technical assistance regarding real estate negotiation and related due diligence services for any approved project using local share funds that involves real property acquisition. Metro and the local park provider must agree to terms for this assistance in a separate land acquisition services IGA and services will be subject to the availability of Metro staff and resources.

11.4 LAND STABILIZATION AND HABITAT ENHANCEMENT

In development of the regional natural areas system, Metro staff have accumulated considerable experience in land stabilization and habitat enhancement. They appreciate opportunities to consider park providers' proposed projects and consult on approaches and techniques. They offer this assistance on a limited basis, subject to the availability of Metro staff and resources.

11.5 DEMOGRAPHIC AND PARK USAGE GEOSPACIAL DATA

Metro staff can provide guidance on collecting park and trail usage data. Metro will assist with data support as feasible and provide guidance, subject to the availability of Metro staff and resources. (See links to the Oregon Parkland Map application and Intertwine annual trail count program in Section 13–Additional Resources.)

12 MONITORING AND DATA TRACKING

12.1 TRACKING OUTCOMES

Metro is defining expectations and developing processes for tracking outcomes for all six bond programs and will share the results of that work when it becomes available.

12.2 REPORTING IMPACTS

Metro is defining expectations and developing processes for reporting impacts for all six bond programs and will share the results of that work when it becomes available.

13 ADDITIONAL RESOURCES

Below you will find a [list of additional resources](#) park providers may wish to consult as they identify and prioritize projects and otherwise meet the bond measure criteria. Metro will add to this list as additional resources become available.

[Bond measure Exhibit A \(Metro's 2019 Bond Measure to Protect and Connect Nature and People\)](#)

Bond measure Exhibit C (Support Local Projects: "Local Share" Guidelines) - included in link above

[Strategic Plan to Advance Racial Equity, Diversity and Inclusion](#)

[2019 Parks and Nature Bond Measure Engagement Summary](#)

[IAPP Public Participation Spectrum](#)

[Spectrum of Community Engagement to Ownership](#)

[Oregon Statewide Comprehensive Outdoor Recreation Plan \(SCORP\)](#)

[The Oregon Parkland Map application](#)

[Intertwine annual trail count program](#)

[Construction Careers Pathways Regional Framework](#)

14 AMENDMENTS TO HANDBOOK

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