



Nature in Neighborhoods Capital Grants Pilot Guidebook

Program Summary and Grant Guidelines

August 23, 2022



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Table of Contents

I. INTRODUCTION	4
A. Purpose	4
B. Program Background	4
C. Summary	4
II. FUNDING ELIGIBILITY, GOALS AND CRITERIA	5
A. The Nature in Neighborhoods Capital Grants Program	5
B. Funding Purpose, Principles and Criteria	8
C. Applicant and Project Eligibility	11
III. PROGRAM DESIGN AND THE PARTICIPATORY PROCESS	13
A. The Participatory Process	14
B. Goals and Vision	17
C. Idea Collection	19
D. Project Development	22
E. Community Vote and Project Selection	24
F. Capital Grants Pilot Process Evaluation	26
IV. APPENDICES	28
A. Roles and Responsibilities	28
B. Funding Requirements	30
C. Agreements	33
D. Grant Management	36

I. Introduction

A. PURPOSE

This document is the program Guidebook for the Nature in Neighborhoods Capital Grants Pilot. The Guidebook will describe the participatory process designed by a committee of community members in collaboration with Metro staff to facilitate a capital grant program for community-led project ideas. It will also describe the guidelines and requirements for application, project eligibility and funding, and expectations for funded projects.

B. PROGRAM BACKGROUND

Funded through the 2019 bond measure, the Nature in Neighborhoods Capital Grants Pilot utilizes a novel participatory approach that gives community members a direct voice in choosing which projects to recommend for funding in their communities. A Program Design and Review Committee composed of community members will help design the program and ultimately recommend up to \$4 million in grant funding to the Metro Council for projects proposed and approved by community members. **The Nature in Neighborhoods Capital Grants Pilot will support community-led projects that benefit historically marginalized communities, protect and improve water quality and fish and wildlife habitat, support climate resilience and increase people's experience of nature at the community scale.** Chosen projects will emphasize community engagement, racial equity and climate resilience as well as meet the requirements of the 2019 Parks and Natural Areas bond measure for capital grants.

C. SUMMARY

The Capital Grants Pilot will provide approximately \$2 million for capital projects in the Metro region for the initial 2022-2023 round of funding.

In 2021, the Capital Grants Pilot selected a committee of community members to guide decision making and program design for a new participatory process. Their work in collaboration with Metro staff and community partners resulted in the process presented here. Derived from participatory budgeting principles, the program design also accounts for the unique jurisdictional relationships between the Metro regional government and its partner jurisdictions and special districts as well as the constraints and criteria of the 2019 park and nature bond.

Through focused engagement and careful community-centered program design, the Capital Grants Pilot will center environmental justice and underserved communities in the Metro region. The process begins by inviting the community to brainstorm project ideas. Community volunteers and government staff then distill and refine project ideas and develop them into feasible project proposals that return to the community for deliberation and a final vote. The projects with the most votes are implemented. A key difference in participatory budgeting processes is that the public's participation is not advisory – the vote itself decides which projects will be implemented with available funds.

The projects funded will fulfill the purposes, principles, and criteria of the voter-approved 2019 parks and nature bond, centering community engagement and racial equity, to protect and improve water quality and fish and wildlife habitat, support climate resiliency, and increase people's experience of nature at the community scale.

II. Funding Eligibility, Goals and Criteria

A. THE NATURE IN NEIGHBORHOODS CAPITAL GRANTS PROGRAM

The Program Design and Review Committee will interpret bond goals into Nature in Neighborhoods Capital Grant Pilot goals, criteria, eligibility and funding requirements. This section will introduce and discuss the 2019 parks and nature bond; its purpose, goals and criteria; and how those will be interpreted into grant requirements, criteria, and procedures for the Nature in Neighborhoods Capital Grants Pilot.

1) PARTICIPATORY BUDGETING AND GRANTMAKING

The 2019 parks and nature bond directed the Nature in Neighborhoods Capital Grants program area to “Pilot a new ‘Participatory Grantmaking’ approach within this program area”.

Participatory Grantmaking is a term used by funders, philanthropists and other grantmakers to describe a different process to award funding. Participatory Grantmaking cedes decision-making power about funding, including the strategy and criteria behind those decisions, to the very communities that funders aim to serve. It is an umbrella term which encompasses a range of different models, including participatory budgeting. Participatory budgeting is generally defined as a democratic process in which community members decide how to spend part of a public budget.

2) 2019 PARKS AND NATURE BOND

Since 1995, voters in greater Portland have passed three Parks and Nature bond measures that protect the region’s air and water, restore fish and wildlife habitat and connect people with nature.

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

The bond measure provides funding across six program areas:

- Protect and restore land, \$155 million
- Local parks and nature projects, \$92 million
- Nature in Neighborhoods capital grants, \$40 million
- Metro parks improvements, \$98 million
- Walking and biking trails, \$40 million
- Large-scale community visions, \$50 million

3) THE NATURE IN NEIGHBORHOODS CAPITAL GRANTS PROGRAM

Across greater Portland, some of the best conservation and nature work is created by community members. Nature in Neighborhoods provides grants to projects led by neighborhood groups, community organizations, schools, park providers, soil and water conservation districts, local governments, and others. The capital projects must protect water quality and fish and wildlife habitat, support climate resiliency, and/or increase a community’s connection to

nature. Metro will provide up to \$40 million for grants funding community-led projects, with an emphasis on benefitting historically marginalized communities over the next ten years.

Over the next two years, Metro staff will work with community to determine the types of projects that would be funded through the grant program. While the grants only fund capital investments, a wide variety of projects will likely qualify. Following the successful capital grants program from 2006 to 2016, four major categories of projects will likely be considered: Land acquisition (such as Nadaka Nature Park), Urban transformations (such as the Plaza at Virginia Garcia Medical Center), Restoration (such as at Mitchell Creek), and Neighborhood livability (such as the Park Avenue Light Rail Station).

In 2021-2022, the bond includes a Nature in Neighborhoods Capital Grants Pilot program that will be designed by community members and award grants through a participatory process. It's a new way of distributing grants that puts more decisions into the hands of the community.

4) HISTORY OF THE NATURE IN NEIGHBORHOODS CAPITAL GRANTS PROGRAM

Title 13

The roots of Metro's Nature in Neighborhoods program can be found in the Regional Framework Plan which unites all of Metro's adopted land use planning policies and requirements including the 2040 Growth Concept and is designed to create sustainable and prosperous communities for present and future generations. Included in these plans is Metro's commitment to protect farm and forest land outside the urban growth boundary, while also preserving the character of urban neighborhoods inside the boundary.

Metro has authority from the State of Oregon for managing the Metro region's urban growth boundary (UGB) and meeting the state's land use planning goals. Effective use of the region's UGB provides protection from urban development for important natural areas, farms and forest resource lands. This is a core value for many Oregonians across all demographics. Additionally, the Metro Council has adopted strong requirements for lands that are brought into urban use to provide better protection for habitat and natural resources and provision of parks, natural areas and trail connections.

Metro has also used its land use authority to protect natural resources inside the region's urban growth boundary. Most significantly is the adoption by the Metro Council of Ordinance 05-1077B (a.k.a. Nature in Neighborhoods) in September 2005 after approximately a ten-year process. The ordinance established standards for development in streamside and wetland areas to conserve and protect fish and wildlife habitat and included Title 13 of Metro's Urban Growth Management Functional Plan, which implements Oregon Statewide Planning Goal 5 (natural resources, scenic and historic areas and open spaces) and Goal 6 (air, water and land resources quality). Metro's Urban Growth Management Functional Plan provides additional region-wide habitat and resource protection through Title 3: Water Quality and Floodplain Protection, which implements Oregon Statewide Planning Goal 7 (natural hazards). Title 13 included a Model Ordinance, which local governments could adopt in whole or in part and the Tualatin Basin Plan which provided compliance with Metro's Title 13 UGMFP for local governments in the Tualatin Basin.

Through Title 13, Nature in Neighborhoods, the framework plan includes requirements for conserving, protecting and restoring the region's fish and wildlife habitat. It identified habitat conservation areas (HCAs) including lands along local rivers and streams, wetlands, floodplains and habitats of concern as the most important for protection (but does not outright prohibit development in these areas). In adopting Nature in Neighborhoods, the Metro

Council chose to rely on a combination of land use protections designed to conserve the highest value habitats and voluntary measures to be implemented by public and private partners.

In adopting Nature in Neighborhoods, the Metro Council chose to rely on a combination of:

- Land-use protections to be implemented by local governments to protect the highest value habitats (riparian area habitat, wetlands and floodplains) in Metro's habitat inventory, and
- Voluntary measures to be implemented by local governments, developers and builders, non-profits and private landowners to protect, enhance and restore fish and wildlife habitat throughout the region including the region's upland wildlife habitat and urban forest.

The Metro Council identified specific areas of focus for Nature in Neighborhoods initiatives including:

- Land acquisition
- Flexible development standards
- Habitat friendly development practices
- Restoration and stewardship
- Monitoring and reporting.

Following adoption of this ordinance, the Metro Council began investing in a number of collaborative strategies, programs and projects to provide the tools, incentives and inspiration to communities on ways to better balance development, human needs and the health of the region's natural systems. This included investments in Nature in Neighborhoods programs like the partnership with the Homebuilders Association of Metropolitan Portland, "Green from the Ground Up" education series, the Integrating Habitats design competition, Nature in Neighborhoods Restoration and Enhancement grants, Outdoor School funding and the development of the Intertwine Alliance.

In 2006 the Council also asked voters to approve a \$227.6 natural areas bond measure for significant regional and local investments in natural area land acquisition, water quality and wildlife habitat restoration. With this voter-approved funding, Metro has purchased for protection nearly 5,000 acres of land important to water quality and fish and wildlife habitat and provided funding to help restore and connect people with nature at places throughout the region. Additionally, in 2013, voters across the Portland metropolitan area approved Metro's five-year levy to help care for regional parks and natural areas. The levy raises about \$10 million per year, including funding hundreds of projects on the ground that help restore habitat in Metro's parks and natural areas and support similar investments in local communities through an expanded Nature in Neighborhoods grant program.

5) THE PROGRAM DESIGN AND REVIEW COMMITTEE

With support from Metro staff, the Program Design and Review Committee establishes bylaws, ground rules, meeting procedures, roles and other Committee norms to guide their work. This Committee will represent the community during program design; vet projects submitted by the community for adherence to program goals and criteria; and refer the community's final vote for project funding to the Metro Council.

B. FUNDING PURPOSE, PRINCIPLES AND CRITERIA

1) PURPOSE AND SUMMARY

Since 1995, voters in greater Portland have passed three bond measures that protect the region's air and water, restore fish and wildlife habitat and connect people with nature. When voters overwhelmingly passed the 2019 bond measure, they endorsed three critical aspects to this work: racial equity, community engagement and climate resilience.

Always a priority for Black and Indigenous communities, racial equity became Metro policy in the years before the 2019 bond measure was developed. That commitment to racial equity is at the heart of the bond measure. As the bond says, every program must “prioritize projects and needs identified by communities of color, Indigenous communities, low-income and other historically marginalized communities.” This will be done in close collaboration and partnership with community members. The bond requires that its programs meaningfully engage with communities of color, Indigenous communities, people with low incomes and other historically marginalized communities in planning, development and selection of projects.

Climate resilience has also become a key task for Metro. The fires that tore through Clackamas County and increasingly extreme weather patterns show that climate change is already affecting the region. The bond measure requires that its projects help people, wildlife and habitats increase their capacity for handling the changes that are underway.

The 2019 parks and nature bond outlined purpose, principles and criteria and minimum requirements to which the Nature in Neighborhoods Capital Grants Pilot must adhere. Those are listed below with explanations in italics.

2) WHAT ARE THE GUIDING PURPOSES FOR THE CAPITAL GRANTS PILOT?

The purpose and intent of the Capital Grants Pilot is as stated below.

A growing population and changing climate threaten streams and habitat Oregonians have worked hard to protect. Treasured parks and trails need improvements to keep up with demand and to be welcoming to all. And some communities – particularly communities of color and other historically marginalized communities – still await equitable access to the benefits of public investments. This proposed 2019 bond measure will allow the region to continue efforts protecting water quality and wildlife habitat for generations to come.

This program will fund community-led projects, with an emphasis on benefitting historically marginalized communities.

These projects will protect and improve water quality and fish and wildlife habitat, support climate resiliency and/or increase people's experience of nature at the community scale.

All projects must satisfy required bond program community engagement, racial equity and climate resilience criteria ... as well as the Capital Grants requirements set forth below.

The Capital Grants Pilot was codified as “Pilot a new ‘Participatory Grantmaking’ approach within this program area.”

3) WHAT ARE THE GUIDING **PRINCIPLES** FOR THE CAPITAL GRANTS PILOT?

Based on community and partner engagement and input from stakeholders, the Metro Council approved the following principles to guide the 2019 parks and nature bond measure.

All of the following principles will guide the Nature in Neighborhoods Capital Grants Pilot.

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 COBID (Oregon Certification Office for Business Inclusion and Diversity) 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. "Capital improvements" that are not part of owning an asset like routine maintenance (operation focused) and that increase its lifespan, new component ok (bond focus).

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. Metro has found ways to prioritize these communities in ways that do not violate the law, like outreach or reducing barriers.

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.

4) WHAT ARE THE **CRITERIA** FOR CAPITAL GRANTS PILOT INVESTMENTS?

Community Engagement and Racial Equity Criteria

Capital Grants Pilot investments must satisfy **all of the following community engagement and racial equity criteria:**

- Meaningfully engage with communities of color, Indigenous communities, people with low incomes and other historically marginalized communities in planning, development and selection of projects.
- Prioritize projects and needs identified by communities of color, Indigenous communities, low-income and other historically marginalized groups. Metro has found ways to prioritize these communities in ways that do not violate the law, like outreach or reducing barriers.
- Demonstrate accountability for tracking outcomes and reporting impacts, particularly as they relate to communities of color, Indigenous communities, people with low incomes and other historically marginalized communities.
- Improve the accessibility and inclusiveness of developed parks.
- Include strategies to prevent or mitigate displacement and/or gentrification resulting from bond investments.
- Set aspirational goals for workforce diversity and use of COBID contractors and work to reduce barriers to achieving these goals; demonstrate accountability by tracking outcomes and reporting impacts.

Climate Resilience Criteria

Capital Grants Pilot investments must satisfy **at least one of the following climate resilience criteria:**

- Protect, connect and restore habitat to support strong populations of native plants, fish and wildlife that can adapt to a changing climate.
- Protect and restore floodplains, headwaters, streams and wetlands to increase their capacity to handle stormwater to protect vulnerable communities from flooding.
- Increase tree canopy in developed areas to reduce heat island effects.
- Use low-impact development practices and green infrastructure in project design and development.

Program Criteria

Capital Grants Pilot investments must satisfy **at least one of the following five program criteria**:

- Build wealth in communities of color, Indigenous communities, low-income and other historically marginalized communities through contracting and jobs.
- Improve human mental and physical health, particularly in communities of color, Indigenous communities, low-income communities and other historically marginalized communities.
- Nurture a relationship with land and create educational opportunities (including Science, Technology, Engineering, Art and Math [STEAM] opportunities) and promote careers in the environmental and agricultural sector, especially for people and youth of color.
- Demonstrate leadership by Black, Indigenous, and People of Color in project identification, selection, design and implementation.
- Increase accessibility of public, park, and other natural spaces.

C. APPLICANT AND PROJECT ELIGIBILITY

1) PURPOSE AND SUMMARY

Proposed projects must fulfill the following minimum requirements to be considered.

The 2019 parks and nature bond outlined purpose, principles and criteria and minimum requirements to which the Nature in Neighborhoods Capital Grants Pilot must adhere. Those are listed below with explanations in italics.

2) WHO CAN APPLY FOR GRANTS THROUGH THE CAPITAL GRANTS PILOT?

Capital grants are intended to support community-driven initiatives; therefore, partnerships are key to a successful proposal. Tribal governments, public schools, non-profits, community-based organizations, local governments and special districts can apply for grants.

Anyone eligible, either individuals or community groups, can submit project ideas during idea submission. Those ideas are refined and developed into project proposals, which act as grant applications for project implementers for Capital Grant Pilot funding.

State or local governments and jurisdictions operating in the Metro region are eligible public agencies. The final capital asset must be publically owned. Tribal governments, non-profits, and community-based organizations would have to partner with a state or local government to be eligible for the capital grants. Tribes may not be considered a public entity under Oregon law, for purposes of the lending of credit prohibition that applies to general obligation bond proceeds. As requested by Metro's tribal relations specialist, Metro may or may not be eligible to be a beneficiary of the capital grants as a partner to tribal governments.

3) WHAT ARE THE MINIMUM PROJECT REQUIREMENTS FOR CAPITAL GRANTS PILOT FUNDED PROJECTS?

- To maximize the impact of investments, projects must demonstrate strong partnerships between community-based organizations and public (non-federal) agencies.

- Grant funds must be expended within the Urban Growth Boundary and/or the Metro jurisdictional boundary or as approved by the Metro Council.

Projects outside the boundaries must provide benefits to people, fish or wildlife within those boundaries to be considered for funding.

- Projects must be clearly achievable given the knowledge, skills and resources available among project partners.
- Expenses must be associated with capital projects only. Funds cannot be used for general operating expenses. Administrative costs will not be eligible for reimbursement in this program. The only reimbursable costs are related to the capital project plus up to 10% for project management staff time.

Administrative costs are defined as: costs including staff costs and Overhead and Indirect Costs, up to a maximum of ten percent (10%) of the total Project Cost for each project. Metro will apply the 10% cap on a project-by-project basis and each Grantee will be responsible for tracking and accounting for its costs to ensure compliance with the 10% cap.

- Projects that involve the acquisition of properties or easements must be negotiated with willing sellers.
- Grantees will be required to evaluate their projects. Progress reports would suffice.

See Appendix D for details on anticipated reporting requirements.

4) WHAT IS A CAPITAL PROJECT AND WHAT EXPENSES CAN CAPITAL GRANTS FUND?

Land or other assets acquired or created with Metro bond funds must be owned by the public and capitalized by a non-federal public entity. *Tribes are not considered a public entity for the reasons referenced above.*

Expenses must be a capital expense. Funds cannot be used for general operating expenses.

“Bond proceeds must be spent on capital costs, which could include, but are not limited to, costs for land acquisition, design, planning and construction, general and program administrative expenses, bond issuance costs and reimbursable bond preparation expenses related to community engagement, design, planning and feasibility of the acquisition and capital construction program.” Projects may be required to partner with a jurisdiction to help develop (i.e. plan, engineering or architectural plans) and jurisdictions would be required to own the capital asset.

5) AVAILABLE FUNDING

Approximately \$2 million will be available in 2022-23 for this competitive Capital Grants Pilot program.

The intent of this grant program is to fund capital projects. Therefore, the minimum project budget eligible for funding is \$10,000 and a maximum project budget eligible for funding is \$250,000 for the 2022-23 Capital Grants Pilot program. Available funds will be divided into two equal pots, one for small projects and one for large projects. Small projects must have project budgets between \$10,000 and \$100,000. Large projects must have project budgets between \$100,000 and \$250,000. Please see the process discussions in this Guidebook for details of how each funding pot will be submitted, developed, and voted on.

6) 2022-2023 CAPITAL GRANTS PILOT PROGRAM AREA

Metro leadership has determined that the spending for 2022-2023 will occur within Metro Council District 4 (Washington County). This will be the program focus area for this round of Capital Grant Pilot funding.

III. Program Design and the Participatory Process

The Committee develops key components of the participatory process in alignment with bond criteria.

This section will detail the participatory process Metro will utilize for the Capital Grants Pilot designed by the Program Design and Review Committee and how it will be implemented within the program area. The diagram below is an overview of that process, its key components, and the Committee's scope of work.

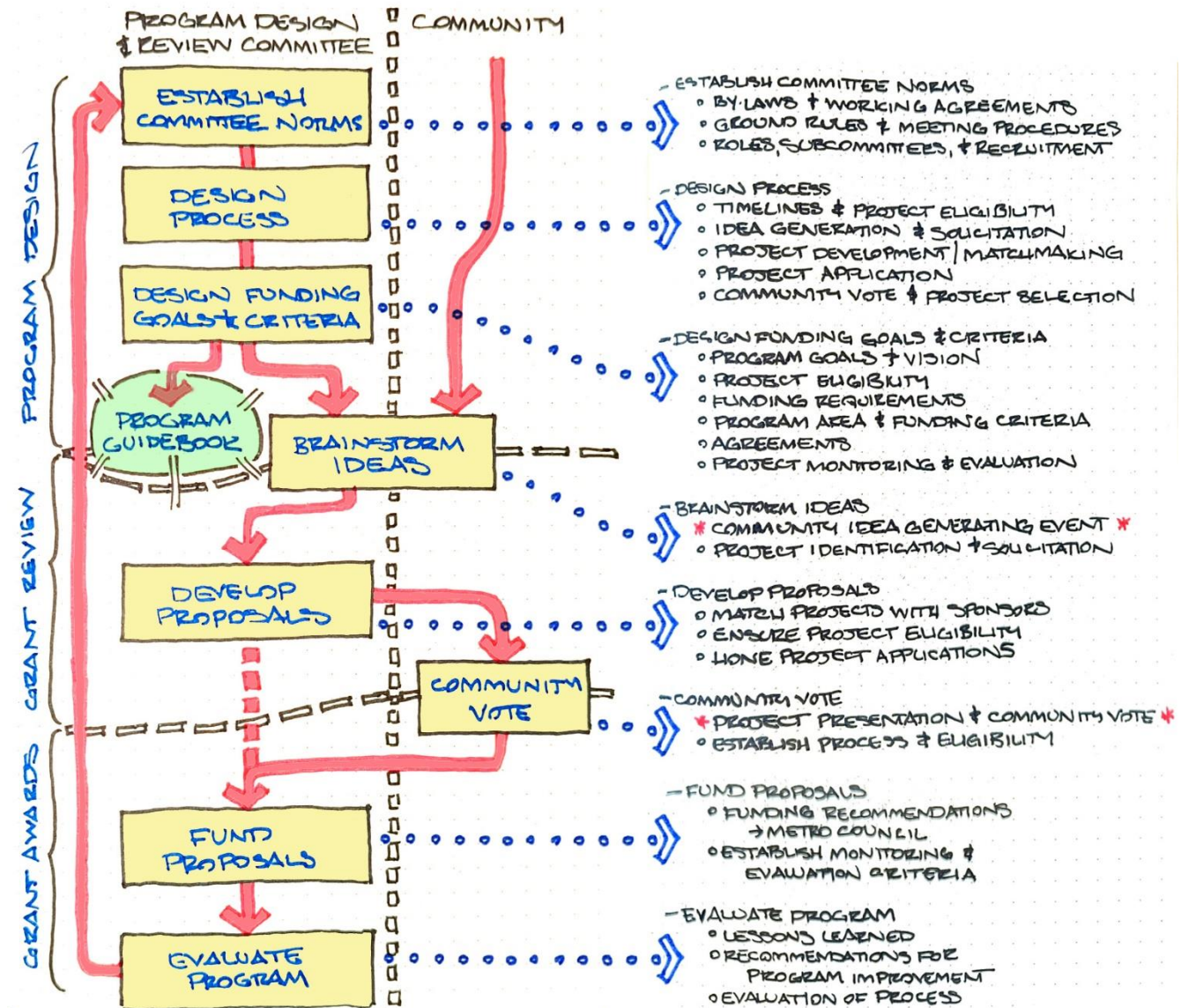


Figure 1: Program Design and Review Committee Scope of Work

The Capital Grants Pilot Timeline

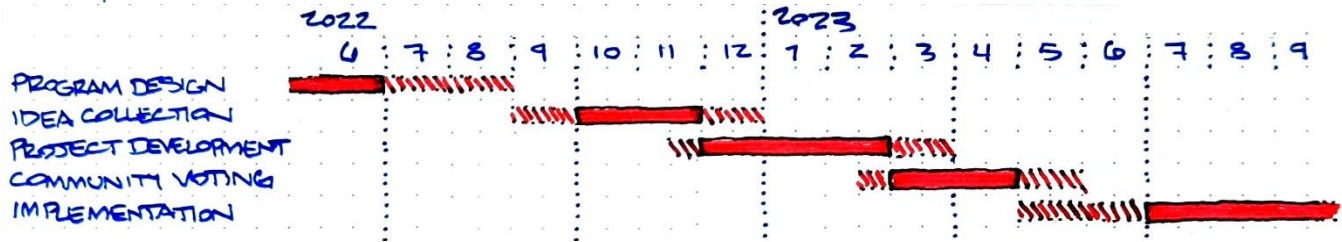


Figure 2: Sketch of the Capital Grants Pilot timeline.

- Program Design: January 2022 to June 2022
- Idea Collection: October 2022 to November 2022
- Project Development: December 2022 to March 2023
- Community Vote: March 2023 to May 2023
- Implementation: Beginning July 2023

A. THE PARTICIPATORY PROCESS

1) WHAT IS PARTICIPATORY BUDGETING?

Among many types of participatory processes, participatory budgeting is a deliberative democratic process wherein community members allocate a portion public money by soliciting ideas from the community, developing them, and then choosing projects to be funded by community vote. In participatory processes, participants are experts, project developers and decision-makers rather than mere spectators or advisors. This approach makes public decisions about public money more equitable and transparent while serving as an investment in civic education and leadership building.

2) THE PARTICIPATORY BUDGETING PROCESS

Participatory processes begin with elected officials dedicating resources to the process and defining broad goals and constraints. From there, the process can vary widely depending on the specific community and the overall goals of a particular process but the essential structure is the same. Usually, the municipality convenes a committee of community members representing a diverse cross-section of the community. In the Capital Grants Pilot, the Program Design and Review Committee works with staff to refine objectives and constraints, determine process rules and timelines, and develop an outreach plan. This information is assembled in a guidebook to ensure that everyone has the same access to information to impact the process.

The formal process begins by inviting the community to brainstorm project ideas. Community volunteers and government staff distill ideas, refine project ideas, and develop them into feasible projects that come back to the community for deliberation and a final vote. The projects with the most votes are implemented. A key difference in participatory budgeting processes is that the public's participation is not advisory – the vote itself decides which projects will be implemented with available funds.¹

¹ Metro Council makes all final grant awards for the Nature in Neighborhoods Capital Grants program, including the Capital Grants Pilot.

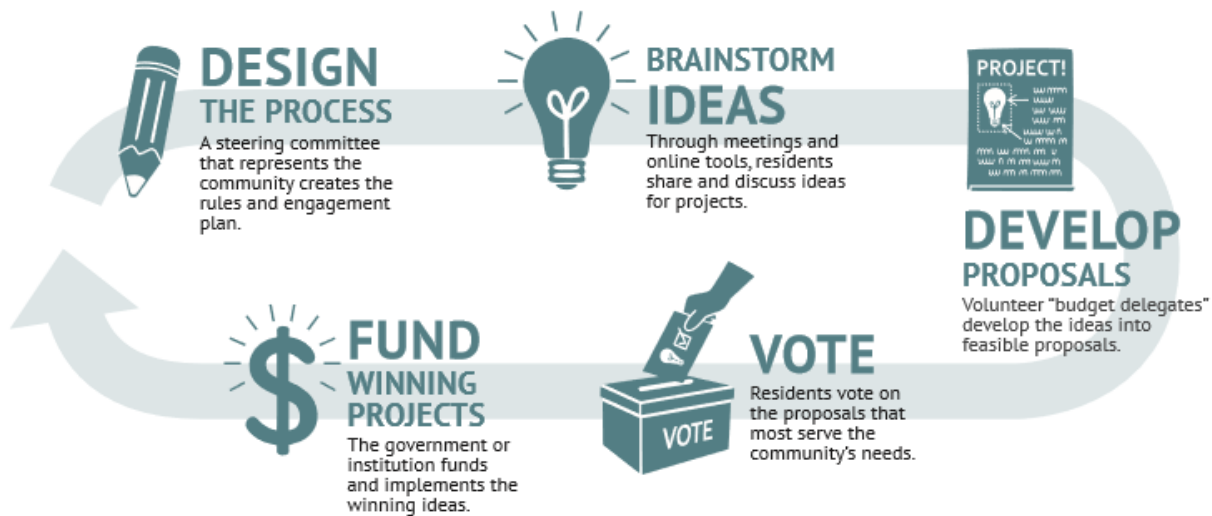


Figure 3: A typical participatory budgeting cycle

3) DEVELOPING A PARTICIPATORY PROCESS FOR THE NATURE IN NEIGHBORHOODS CAPITAL GRANTS PILOT

Introduction

Every participatory process is different and adapts to the needs of the community it serves, adheres to the constraints of the funding and regulatory limits of implementing jurisdictions, and reflects the goals and values defined by the Program Design and Review Committee (commonly referred to as Steering Committees in many participatory budgeting models).

The participatory model presented in this guidebook was developed in collaboration by the Program Design and Review Committee and Metro staff to interpret the purpose, principles and criteria of the 2019 parks and nature bond through the values of community engagement and community ownership, racial equity, and transparency. These goals guide a framework that adheres to legal and fiscal constraints, represents project development best practices, and respects the staff capacity and autonomy of local jurisdictions within the Metro region. This model is the result of numerous interviews with other jurisdictions with active participatory budgeting programs, consultation with other Metro departments and staff, and consideration by Metro leadership and community engagement specialists. It represents the best intentions of the Committee while respecting the unique challenges of participatory budgeting programs and Metro's relationship with other local jurisdictions and their communities.

Adaptations

Beginning with a recognition that all participatory budgeting programs are unique and adapt to the particular contours of their local administrative and political structures, this model follows the common participatory budgeting model of Idea Collection, Project Development, and Community Vote. In interviews with other jurisdictional practitioners, two of the common challenges with this model are limited staff capacity and community volunteer attrition. To address these challenges, the Capital Grants Pilot will introduce two principal adaptations:

- 1) A Budget Delegate Summit will be a community event to both collect ideas in person and allow idea submitters and organizations to develop ideas to a schematic level with a defined scope, budget, and plan and with the aid of Metro staff, subject area experts, and jurisdictional staff. This makes more efficient use of limited staff capacity as well as providing a forum for community members to submit, discuss, and develop their ideas with their neighbors.

- 2) A multi-vote process allows the community to weigh in early on their preferences, generate additional excitement for the program, and reduce the burden on jurisdictional staff and community members to develop projects unlikely to be funded by the Community Vote. The first vote would establish the community's preferred projects for further development, while the second would recommend final funding after further development.

These adaptations have three principal rationales that reflect the needs mentioned above and the recommendations of the Program Design and Review Committee:

- They respect the funding constraints and budget needs of the funding source, the 2019 parks and nature bond, and Metro's unique jurisdictional relationships.
- They create multiple public community touchpoints throughout the participatory process to ensure that projects are developed with community members, not just for them.
- They maintain public community engagement throughout the process, not just for selective members actively developing projects or as bookend input.

4) MODEL SUMMARY

Multiple Funding Streams

The Capital Grants Pilot will provide multiple funding pots and project development streams, divided between small and large projects.

Idea Collection

- Concepts and ideas for small projects are submitted by community members and community-based organizations.
- A Community Priorities Survey identifies community needs and desires for large projects in and around their neighborhoods.

Project Development

Small Projects

- 1) The Program Design and Review Committee vets submitted ideas for potential feasibility. (Is it legal? Is it feasible? Does it align with bond and program criteria?)
- 2) Budget Delegate Summits held in program area neighborhoods connect idea submitters to implementer or planning staff to build back-of-the-envelope project concepts with scope and budget outlines.
- 3) Summit-developed concepts are then shaped by implementer and Metro staff to a Schematic Design (scope, budget, location, design).
- 4) A Preliminary Community Vote is held to identify a pool of potential projects to be further developed.
- 5) Implementer staff develops projects ideas into complete project proposals and grant applications in preparation for a Final Community Vote.

Large Projects

- 1) The Program Design and Review Committee takes a summary of the community priorities survey to potential project implementers.
- 2) Potential project implementers identify projects that align with stated community needs and desires.

- 3) A Preliminary Community Vote is held to identify a pool of potential projects to be further developed.
- 4) Implementer staff develops projects ideas into complete project proposals and grant applications for a Final Community Vote.

Community Vote

- 1) Project expos present the final pool of potential projects for funding.
- 2) The community votes on two slates of projects, large and small, online or in-person.
- 3) Community vote results are forwarded to the Program Design and Review Committee for their recommendation.
- 4) The Program Design and Review Committee recommends funding to the Metro Council.

5) COMMITTEE RECOMMENDATIONS

The Program Design and Review Committee approved the implementation framework shown in Figure 4 with the caveat that it includes robust community engagement at every stage.

B. GOALS AND VISION

1) PURPOSE AND SUMMARY

In addition to the goals and values intrinsic to participatory budgeting frameworks, the Program Design and Review Committee, as a representative of the Metro regional community, is tasked with defining additional program objectives, goals, and values to guide the process in support of the parks and nature bond purpose, principles, and criteria. This section discusses the goals and values of participatory processes (grantmaking and budgeting) and the Capital Grants Pilot.

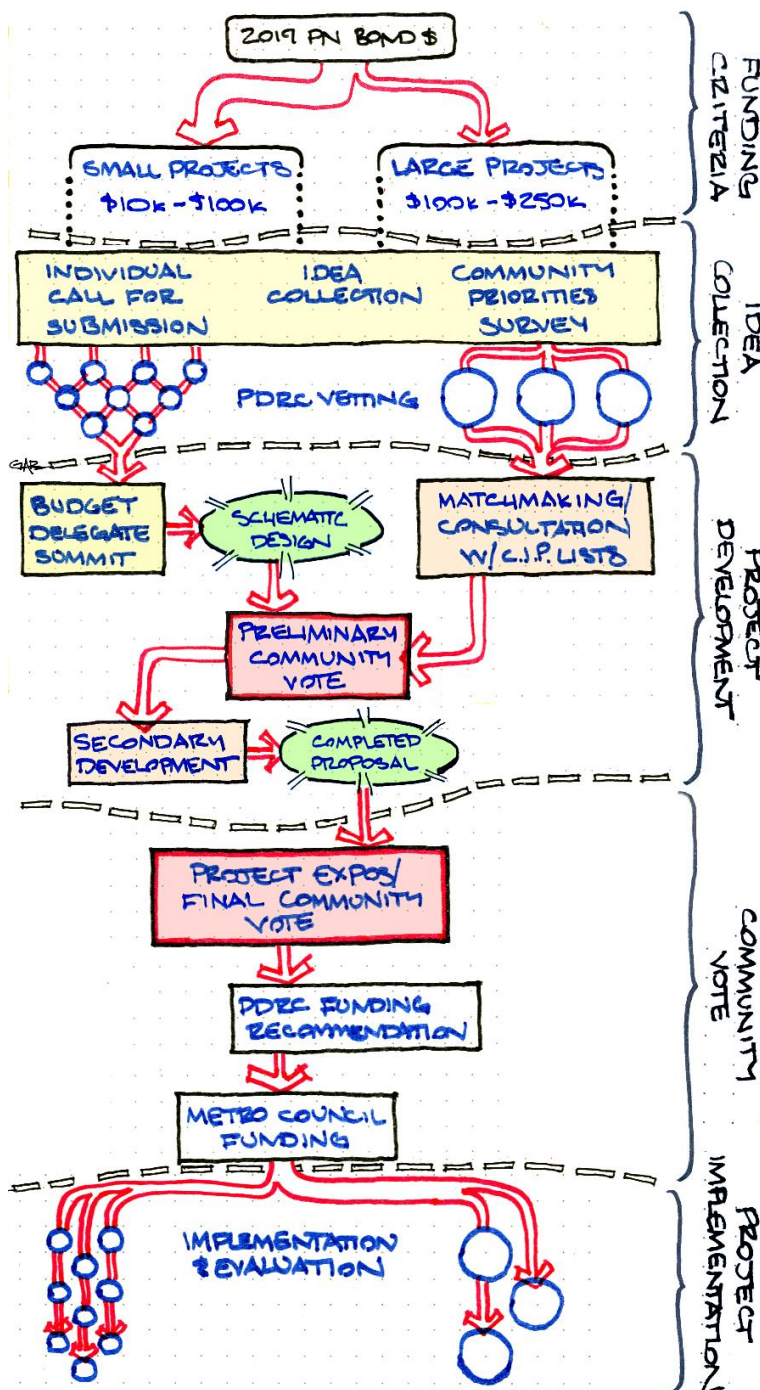


Figure 4: Funding Stream and Implementation Diagram

2) PROCESS GOALS

General Process Goals for Metro:

- Support, develop and activate new and existing community leaders
- Increase transparency in decision making processes

Once geography is established:

- Clearly define and establish what communities on which the project is being centered
- Develop process goals and establish measures of successful outcomes through community-led processes

3) COMMUNITY FOCUS

Committee recommendations for centering intended participants and investments:

- **Environmental justice:** center communities that are disproportionately impacted by pollution and environmental hazards, and/or disproportionately vulnerable to climate change-related disasters
- **Underserved communities:** center communities that are or have been historically underinvested, nature-deficient, represent intersecting marginalized identities, and/or communities impacted by displacement or gentrification.

Instead of focusing on a particular population (e.g. youth or people with disabilities), use a targeted universalist approach: ²

- Bring in the general population for crowdsourcing ideas, then engage underserved voices to ensure their voices are being heard
- Engage multi-generational audiences to get a complete understanding of the community's needs

4) COMMUNITY ENGAGEMENT GOALS AND PRIORITIES

The Program Design and Review Committee also suggested several potential community engagement tactics and strategies that could be used in service of the overall program goals. The suggestions shown below in Figure 5 were developed through an open-ended process of ideation and dialogue utilized throughout the Capital Grants Pilot program design phase.

² From the Othering and Belonging Institute: "Targeted universalism means setting universal goals pursued by targeted processes to achieve those goals. Within a targeted universalism framework, universal goals are established for all groups concerned. The strategies developed to achieve those goals are targeted, based upon how different groups are situated within structures, culture, and across geographies to obtain the universal goal. Targeted universalism is goal oriented, and the processes are directed in service of the explicit, universal goal." Source: <https://belonging.berkeley.edu/targeted-universalism>

Goals & Priorities

Q: What are **inclusive and equitable community engagement strategies** we can use in this process?

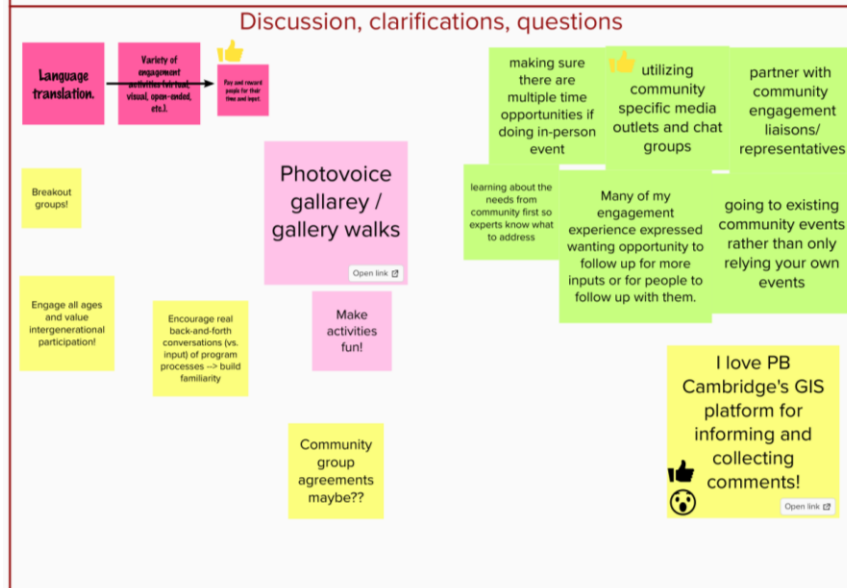


Figure 5: Inclusive and equitable community engagement strategy suggestions from the Program Design and Review Committee

C. IDEA COLLECTION

1) PURPOSE AND SUMMARY

Many participatory processes, including typical participatory budgeting models, engage the community in a similar structure: Design the process (Program Design and Review Committee), Idea Collection, Project Development, Community Vote, and Project implementation. Idea Collection occurs after the Committee has produced a guidebook which establishes the rules specific to this process, and is where the general public (as defined in the guidebook) are invited to participate in brainstorming ideas for projects. This activity often takes the form of idea generating events and/or online idea submissions. **The purpose of the Idea Collection phase is to provide opportunities for community members to share their passion and lived experience, and to provide an accessible venue for them to share their ideas for what type of projects that should be created.** This is also an opportunity to provide general education on the process, the funding, what the process hopes to accomplish, and to recruit participants for engagement in subsequent phases.

This process component can take many forms and is adaptable depending on the funding mechanism, program process, and community needs and desires. The vast majority of contemporary programs provide opportunities for

both in person and online participation, and many processes have prioritized investing in civic technology ³ platforms for online engagement as a tool for transparency and broadening access. This is a relevant precedent for this project where, due to COVID-19 concerns, large in-person gatherings are discouraged for public health reasons. Some examples of community engagement efforts during the brainstorm idea phase include community workshops, collaborative design exercises, tours, treasure hunts and design competitions.

2) IDEA COLLECTION PROCESS

- Concepts and ideas for small projects are submitted by community members and community-based organizations.
- A Community Priorities Survey identifies community needs and desires for large projects in and around their neighborhoods.

3) LEGISLATION GUIDANCE

Established community guidelines

The parks and nature bond language established a set of guidelines for community engagement and community focus or themes.

Who will be engaged in the Capital Grants Pilot?

The Capital Grants Pilot will engage community groups, nonprofit organizations, schools, park providers, soil and water conservation districts and others in neighborhood projects that benefit people and nature.

Individual community members will be engaged through the above and through open invitation through outreach and advertising.

4) COMMITTEE RECOMMENDATIONS

Process

Age requirements

The Committee agreed on a minimum age of 11 for idea submission and the Community Priorities Survey. *Allowing young people to participate ensures that their interests and desires are included in the process and teaches civic participation.*

Geography requirements

The Committee determined that the Community Priorities Survey be limited to individuals and groups within the program geography, but that idea submission is open to the entire Metro region. *By doing so, it ensures that the voices centered through the survey are those of the communities the Pilot is intended to serve, but that the Pilot can gather ideas from across the region, leveraging the creativity of the entire Metro region.*

Credentialing

To verify eligibility, the Committee determined to use participants' self-attested age and zip code for both Idea Collection and the Community Votes. In addition, contact information would be requested, but not required, for

³ Civic technology is a dynamic field that provides numerous digital tools and platforms specifically designed for participatory processes and direct democracy.

submitted ideas to enable continued project collaboration, and anonymous demographic information would be requested, but not required, to help evaluation efforts ensure that the Capital Grants Pilot serves its intended purposes. *Allowing for self-attestation increases accessibility to the process for those usually excluded from institutional processes.*

Large Project Matchmaking

The Committee confirmed that the Community Priorities Survey and matchmaking process meet the intent, goals, and values of this program, contingent on survey design and matchmaking process. The survey should be available in-person, in multiple languages, clear in purpose and meet the racial equity and engagement requirements of projects.

Community Engagement

The Committee discussed inclusive and equitable community engagement strategies to use in idea submission. They submitted the following ideas as potential practices:

- learning about the needs from community first so experts know what to address
- Make activities fun!
- Option to start with storytelling
- Having staff fill out forms while giving space for delegates to speak and elaborate their ideas
- Variety of engagement activities (virtual, visual, open-ended, etc.).
- Follow-up: For many communities including indigenous peoples, cultural practices and materials like oral stories are a deep, sometimes sacred, part of their heritage.
- going to existing community events rather than only relying your own events
- Allow participants to write up key questions
- "snowball fight"
- Explicitly describe our intentions of including those often excluded.
- Use infographics, stories, and photos for project background and proposal guidelines. Also, interpretation > direct translations
- Staff needs to have a transparent protocol for permissions regarding how they would steward/protect particular narratives to respect cultural property and avoid unnecessary harm. Otherwise, seemingly good intentions of sharing others' stories could have unintended negative impacts on trust!
- utilizing community specific media outlets and chat groups - ex) idea recruitment ad
- Understand that youth are encouraged to attend (especially for those of us who have served as "translators" to our parents!)
- Another PB group allocated one chosen project to be voted by a Youth Committee!
- Icebreaker activities like nature storytelling (shared in Metro's Connecting with Nature Report)
- Using Minecraft to engage community/youth urban greenspace planning?! (learned about this from a "People Fixing the World" podcast)
- "The Block by Block Playbook: Using Minecraft as a Participatory Design Tool in Urban Design and Governance"

In-person idea collection

The Committee discussed how ideas are submitted in-person (E.g., community events, info sessions, community public spaces like libraries, schools, religious spaces). They made the following recommendations as potential opportunities for in-person idea collection:

- school events, community centers,
- Tabling at gathering locations identified specifically by community (e.g., marketplace, park, etc.)
- Classic focus group events - we could call them "ideation stations" :)
- At earlier sessions, make a space for people to offer suggestions?
- For those visiting such sites, they should have understanding of cultural "manners"
- going to existing community events rather than only relying your own events
- asking before going/promoting in a space
- community liaison pickups
- In person in-language surveys / or in person collection tools

D. PROJECT DEVELOPMENT

1) PURPOSE AND SUMMARY

The purpose of the Project Development phase is to take ideas submitted during the Idea Collection phase and develop them into complete project proposals including scope, budget, and schematic design for the community to choose among during the Community Vote phase.

How do projects get developed in a participatory budgeting process?

In many North American participatory budgeting programs, a working group or sub-committee of the Steering Committee (the Program Design and Review Committee in the Capital Grants Pilot), also called Budget Delegates, are community members who are recruited/volunteer during the Idea Collection step, take the ideas that were generated in Idea Collection, and sort them into categories. They then work with government staff (project implementers) to refine and develop viable project ideas into feasible project proposals. For the Capital Grants Pilot, the Budget Delegates who will work with Metro and implementer staff will be composed of members of the Program Design and Review Committee and other community members or organizations who submit or sponsor project ideas.

Depending on the location of the project idea, the community may be able to identify a project implementer. If not, Metro staff, the Committee, and/or Budget Delegates would act as matchmakers between jurisdictional and community partners. They would identify a potential project suggested during the idea-generating event/phase, and then present that potential project to a jurisdictional partner and a community partner to develop, with the Committee (or a sub-committee) acting as a consultant, matchmaker, and facilitator to those partners as they develop projects.

Key government staff or contractors for those governments (project implementers) work with the Budget Delegates or sub-committee during the project development step. Their role is to advise on what is possible, estimate project cost, and inform budget delegates on relevant internal processes (i.e. procurement policies, spending restrictions, etc.).

The Program Design and Review Committee, a sub-Committee thereof, and/or Budget Delegates will work with government staff to develop ideas collected from Idea Collection into a predetermined number of projects for the ballot. This happens through a series of facilitated work sessions, meetings with staff (Project Vetting), site visits, and a Preliminary Community Vote.

2) PROJECT DEVELOPMENT PROCESS

Small Projects

- 1) The Program Design and Review Committee vets submitted ideas for potential feasibility. (Is it legal? Is it feasible? Does it align with bond and program criteria?)
- 2) Budget Delegate Summits held in program area neighborhoods connect idea submitters and community members to implementer staff and subject experts to build back-of-the-envelope project concepts with scope, budget, and design outlines.
- 3) Summit-developed concepts are then shaped by implementer and Metro staff to a Schematic Design (scope, budget, location, design).
- 4) A Preliminary Community Vote is held to identify a pool of potential projects to be further developed.
- 5) Implementer staff develops projects ideas into complete project proposals and grant applications in preparation for a Final Community Vote.

Large Projects

- 1) The Program Design and Review Committee takes a summary of the Community Priorities Survey to potential project implementers.
- 2) Potential project implementers identify projects that align with stated community needs and desires.
- 3) A Preliminary Community Vote is held to identify a pool of potential projects to be further developed.
- 4) Implementer staff develops projects ideas into complete project proposals and grant applications for a Final Community Vote.

3) LEGISLATION GUIDANCE

The parks and nature bond legislation established guidelines on the community engaged, type of project development support that would be provided to applicants, and the definition of a capital project.

Funding Source Limitations

Metro is constrained by legal and fiscal constraints around the use of parks and nature bond funding. Per the Metro bond measure and the Oregon constitution (ORS 310.140), bond proceeds must be spent on 'capital costs'. Funding for project scoping, feasibility studies, and other project development costs resulting from an idea generating community workshop are not considered capital costs and thus will be need to be paid for from a source other than bond funds. Capital projects funded by the bond measure must also be on public land, meaning a local government agency are the landowners or easement holders of the land. Therefore, the project development process is adapted to meet those constraints.

Who will be engaged in the Capital Grants Pilot?

The Capital Grants Pilot will engage community groups, nonprofit organizations, schools, park providers, soil and water conservation districts and others in neighborhood projects that benefit people and nature.

Individual community members will be engaged through the above and through open invitation through outreach and advertising.

4) COMMITTEE RECOMMENDATIONS

Process

Vetting

In addition to ensuring projects meet minimum requirements, the Committee will use the established program criteria to vet projects and narrow the pool of potential project ideas for project development. The Committee will use graded scoring, in which the Committee will decide weights for each criteria based on prioritization vote and discussion.

Budget Delegate Summits

The Committee agreed that Budget Delegate Summits will meet the intent, goals, and values of this program contingent on event and engagement efforts. This includes engaging communities of interest in their spaces and providing resources necessary for inclusion and accessibility.

Multiple events

The Committee determined that Budget Delegate Summits (where project ideas are developed with implementers) will be done as multiple smaller events organized by neighborhood.

Community Engagement

The Committee suggested several inclusive and equity-centering community engagement strategies to potentially use for budget delegate summits and project development:

- Project implementers and landscaper[s] being receptive to ideas that they may not be traditionally accustomed to
- Sharing photos/stories of past projects -- big posters! Have past awardees have a station to share own experiences of proposal process? Or even hosting event at a project site!
- providing food, drinks, and a wide variety of ways to participate (virtual and in person)
- Provide stipends to honor peoples time
- different booths for different expert areas or projects
- have different sessions/rooms for different languages
- mock up project sites like Park(ing) Day displays

E. COMMUNITY VOTE AND PROJECT SELECTION

1) PURPOSE AND SUMMARY

After project proposals have been fully developed, those ideas are presented to the community for a vote to choose which projects should be funded. **The community vote is the step in the process in which all eligible members**

of the public, as determined by the Program Design and Review Committee and outlined in the Guidebook, vote on which projects they would like to see implemented.

Voting often takes place both in person at *Project Expos* and community spaces and through online voting via *digital participation* on *Civic Tech* platforms. Typically, there is a printed ballot that has been translated into multiple languages. In addition to events, there is the possibility of conducting mobile voting by taking ballot boxes to other community events or by placing ballot boxes in publicly accessible locations (e.g. libraries, schools, etc.).

2) COMMUNITY VOTE PROCESS

- 1) Project expos present the final pool of potential projects for funding.
- 2) The community votes on two slates of projects, large and small, online or in-person.
- 3) Community vote results are forwarded to the Program Design and Review Committee for their recommendation.
- 4) The Program Design and Review Committee recommends funding to the Metro Council.

3) LEGISLATION GUIDANCE

The 2019 parks and nature bond outlined purpose, principles and criteria and minimum requirements to which the Nature in Neighborhoods Capital Grants Pilot must adhere. Those are listed below with explanations in italics.

What is the process of Capital Grants Pilot review and award of projects?

The Program Design and Review Committee, staffed by Metro, will ... review all projects and make funding recommendations to the Metro Council. *For example, after the community vote has occurred, the review Committee could consider the grant awards based on the outcomes of the community vote.*

The Metro Council will make all grant awards. *For example, after the community vote has occurred, Metro Council could consider the Committee's funding recommendation, which will include consideration of the bond criteria and the outcomes of the community vote and make the grant award based on that outcome.*

What is the process of Capital Grants Pilot review and award of projects?

Grants will be solicited and awarded at least once per year.

More than one process for selecting projects may be created to respond to project size, scope and complexity, *such as the Capital Grants Pilot.*

A review Committee, staffed by Metro, will be established to review all projects and make funding recommendations to the Metro Council. *For example, after the community vote has occurred, the review Committee could recommend the grant awards based on the outcomes of the community vote.*

The Metro Council will make all grant awards. *For example, after the community vote has occurred, Metro Council could validate or approve the results of the vote and make the grant award based on that outcome.*

4) COMMITTEE RECOMMENDATIONS

Process

Age requirements

The Committee agreed on a minimum age of 11 for the Community Votes to be consistent with Idea Submission and the Community Priorities Survey.

Geography requirements

The Committee selected that participation for the Preliminary Vote be limited to the program area geography while the Final Vote be open Metro-wide to ensure that projects presented on the final ballot align with the needs and desires of the program geography communities.

Credentialing

To verify eligibility, the Committee determined to use participants' self-attested age and zip code for both Idea Collection and the Community Votes.

Voting distribution

The Committee determined that the votes would occur both digitally and in-person at multiple smaller events in community spaces.

Voting method

The Committee determined to use a Ranked Choice Voting method for the Community Votes.

Community engagement

The Committee discussed inclusive and equity-centering community engagement strategies to use in this project expos and community votes:

- Hybrid - in person can use things like stickers or ballots
- Mail-in option with info packet lessens the burden
- Stickers on project location maps
- Give voters option of being notified of voting results and/or future civic engagement work with Metro.
- Freebies like Oregon Zoo tickets?!
- Yes. 2 week (whatever feasible) transit pass is nice too...although that's TriMet not Metro
- Educational materials if using more novel voting methods like Ranked-Choice

F. CAPITAL GRANTS PILOT PROCESS EVALUATION

1) PURPOSE AND SUMMARY

The Committee will help decide how the Capital Grants Pilot process will be evaluated. This evaluation will be public, and it will be used by lots of different folks: members of the public, Metro staff and elected officials, and by other jurisdictions looking to run their own participatory processes. In addition, an external evaluation will be conducted to ensure that the Capital Grants Pilot is delivering meaningful engagement and outcomes in alignment with the 2019 parks and nature bond.

2) COMMITTEE RECOMMENDATIONS

The Nature in Neighborhoods Program Design and Review Committee discussed evaluation of the Capital Grants Pilot process. In addition to using the evaluation criteria for the program, the Committee would like the following items to be addressed:

- Partnerships created, capacity and resources built among groups.
- Community impact – is this what people want? Which people and why?
- Climate adaptability of project.

3) METRO DECISIONS

Metro Parks and Nature bond staff worked with a contractor, Dialogues in Actions, for a year and a half to establish program outcomes and corresponding evaluation tools, interview questions and a survey for the Program Design and Review Committee and in the future participating community members in idea collection, project development and community votes.

Throughout the Capital Grants Pilot, Dialogues in Action will evaluate whether the Capital Grants Pilot is successfully adhering to its goals and values and serving the established focus communities through a series of surveys and interviews. The principal outcomes they will be evaluating for are the following:

- Communities and partners who have been excluded from governmental decisions and who have not been served equitably by past bond investments are engaged and influential in bond-funded decisions.
- Community members care for natural areas in their neighborhoods and develop long-term stewardship habits

IV. Appendices

A. ROLES AND RESPONSIBILITIES

With support from Metro staff, the Program Design and Review Committee establishes bylaws, ground rules, meeting procedures, roles and other Committee norms to guide their work. This Committee will represent the community during program design; vet projects submitted by the community for adherence to program goals and criteria; and refer the community's final vote for project funding to the Metro Council. This section will detail the roles and responsibilities for the Capital Grants Pilot for the Program Design and Review Committee, Metro staff, and Metro Council.

1) THE PROGRAM DESIGN AND REVIEW COMMITTEE

Summary of Roles

Metro recruited 7-11 community members that reflect the racial, ethnic and economic diversity of the region to help design the Nature in Neighborhoods Capital Grants Pilot. In order to ensure that this Committee is representative of the communities that Metro serves, Metro invited community members that reflect the broad diversity of experience and background in the region to apply.

Metro looked for individuals from a wide variety of backgrounds including those with academic, professional and lived experience on best practices related to water quality, habitat restoration and traditional ecological knowledge to create the greatest benefits for people, plants and wildlife. This includes expertise in water quality and habitat restoration; landscape architecture; real estate; community development; workforce development, job training and apprenticeship programs; climate adaptation and resilience policies and practices; sustainable development techniques, such as green infrastructure, sustainable agriculture and carbon sequestration; and those who can represent the interests of tribal communities.

Additionally, Metro looked for committee members with experience and expertise in participatory budgeting, direct democracy and community engagement; connecting communities to nature; racial equity advocacy and implementation; and environmental justice and advocacy. Finally, chosen Committee members were those committed to Metro's parks and nature mission and to supporting opportunities for communities of color and other historically marginalized communities to design and build access to nature for their communities.

Program Design

Working within the bond framework, Committee members establish a shared vision for the program and design the ground rules and values that will guide the program from start to finish. From there, they will design the process by which projects are identified, developed and evaluated.

Working with Metro staff, they will also help:

- Identify and implement innovative methods, through project development and capacity building, to support communities of color and other historically marginalized communities to prepare and submit applications (funding proposals).
- Create selection criteria and program materials that respond to community feedback and ensure compliance with the Nature in Neighborhoods capital grants program objectives and three bond criteria: racial equity, community engagement and climate resilience.

- Review application materials and processes to reduce barriers for communities of color and other historically marginalized communities to submit strong proposals.
- Adopt a methodology to evaluate, track and report on the program's effectiveness.

Grant Review

In addition to designing the process, Committee members will help evaluate, support and review funding applications from the community. The Committee will then forward the results of a community vote that identifies which projects to recommend to Metro Council for funding. In this capacity, the Committee will work with Metro staff to:

- Evaluate applications for funding (funding proposals) to determine whether they meet the Nature in Neighborhoods capital grants program criteria, bond criteria and whether the applicants and their partners have the capacity to implement their project as described, and the appropriate fiscal accountability.
- Offer suggestions to strengthen applications (funding proposals).
- Forward funding recommendations from the community vote to the Metro Council.

Note: Review Committee members may still propose funding ideas, but reviewers must disclose any conflicts of interest.

Note: The Metro Council makes all final funding decisions.

2) METRO STAFF

Summary of Role

Metro staff will:

- Identify and implement innovative methods, through project development and capacity building, to support communities of color and other historically marginalized communities to prepare and submit applications.
- Create selection criteria and program materials that respond to community feedback and ensure compliance with the Nature in Neighborhoods capital grants program objectives and restrictions placed on bond funding. *If the handbook sets forth the selection criteria and program materials, then Metro staff is ultimately responsible for this work. Metro staff must obtain community feedback outside of the Committee.*

Technical Assistance for Grant Applicants and the Committee

Metro staff will:

- Consult with experts from a wide variety of backgrounds including those with academic, professional and lived experience on best practices related to water quality, habitat restoration, land acquisitions, and traditional ecological knowledge in order to offer technical assistance to applicants ... on creating the greatest benefits for people, plants and wildlife. *If the Committee is composed of members with this area of expertise or provides trainings in these areas of expertise, that would satisfy this requirement.*
- Provide trainings, resources and technical assistance to support applicants with lower capacity and applicants from communities of color through project development and capacity-building.
- Provide assistance to grantees in resolving unexpected situations during project development, permitting, contracting and construction that could influence the project's success.

- Provide staff reports, organize site visits and other additional information requested by the committee to provide additional information to inform their project vetting process.
- Coordinate with participatory budgeting/grantmaking expert consultants to provide context and support to the committee process and facilitate the idea generation and voting processes.

3) IMPLEMENTER STAFF

Implementers in the Capital Grants Pilot are the partner jurisdictions and districts that will help facilitate the participatory process and ultimately own the capital assets funded by these capital grants. These agencies will provide technical and community engagement assistance throughout the process and in preparation of final project proposals.

4) METRO COUNCIL

Metro will create a structure that aligns with the goals of the participatory budgeting process and adheres to the bond legislation as well. This structure will involve consideration of the community vote by the Committee and the Metro Council. The Metro Council will make *all final decisions* on grant awards.

B. FUNDING REQUIREMENTS

1) PURPOSE AND SUMMARY

This section describes the match and funding requirements of the Nature in Neighborhoods Capital Grants Pilot program.

2) LEGISLATION GUIDANCE

The 2019 parks and nature bond outlined purpose, principles, criteria and minimum requirements to which the Nature in Neighborhoods Capital Grants Pilot must adhere. Those are listed below with explanations in italics.

What are the funding requirements and mechanisms for the Capital Grants Pilot?

- The program will allow for flexible match requirements to maximize racial equity outcomes. The program will also encourage projects that leverage additional government and private funding to increase the overall program impacts. Match may be cash, in-kind donations of goods or services, staff time or volunteer hours. Funds from other Metro programs or Metro staff time can be utilized in the project but cannot be counted as matching funds. *Match requirements will be determined project by project based on project budget and location. See below for more details.*
- Metro may award funds to a project with conditions of approval, including the need to meet matching requirements.
- Applicants must demonstrate that there are long-term designated funds available to maintain the project for its intended purpose. *Examples of this include a commitment in writing of who is paying long term maintenance (e.g. government asset owner, applicant or partner) and audited financial statements from the organization who is paying for the long-term maintenance with a clean audit opinion.*

- Grant funds are typically provided on a reimbursement basis. *Legal staff has stated that this means having a reimbursement component, but the actual percentage is not defined. For example, the local share program offers upfront payments. However, local governments typically will have more resources to reimburse Metro and the same might not be true for other non-profits or community groups. Financial staff would be fine mirroring the 30 percent up-front from the levy Nature in Neighborhoods community grants program.*
- No more than 10 percent of grant funds will be used for staff time directly related to a project; projects that address racial equity may exceed 10 percent as approved by the Metro Council. Overhead and/or indirect costs are not reimbursable, but can be used to meet matching requirements not to exceed 10% of total project costs.

What are the budgets that will be required for Capital Grant Pilot projects?

Each grant recipient jurisdiction will be required to submit a project budget with their project proposal. The project budget submitted should outline the total project cost summarized by major spending category and should include whether each line item is a direct project cost or an administrative capital cost and whether that cost will be covered by the grant or match. Metro will provide a template and instructions for the budget document. The *grantee* should prepare project scopes and budgets with care, applying conservative estimates. A percentage of project budget should be set aside as contingency to cover unforeseen expenses. The amount of contingency should be based on each jurisdiction'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 or grant contract*. If a grantee has received upfront funds and the project becomes infeasible or otherwise did not utilize the upfront payment, grant recipients will return the unspent funds. Alternatively, Metro does not have additional funds to cover added expenses or project budget overages. Budget overages are the responsibility of the grant recipient.

What is the definition of capital costs for the Capital Grants Pilot?

"Administrative Costs" means Capital Costs that are not Direct Project Costs, including program development expenses, administrative and finance staff support, expenses related to board community engagement and outreach, and any other payments that are required to facilitate bond-funded capital projects but are not directly tied to a project.

"Capital Costs" means costs that are considered capital under generally acceptable accounting principles (GAAP), which costs include the costs of capital construction, capital improvements or other capital costs, as those terms are defined by the relevant provisions of the Oregon Constitution and Oregon law (including ORS 310.140). Each jurisdiction should also ensure that the costs incurred as capital adhere to their own internal capital policies. Capital costs can include staff time to the extent it is allowable under each jurisdictions existing financial policies.

"Direct Project Costs" means Capital Costs that are expended for the acquisition, development, or construction of a Metro parks and nature bond-funded project.

Eligible capital costs

The Nature in Neighborhoods Capital Grants are being funded using general obligation bond proceeds. General obligation bonds (sometimes referred to as GO bonds) may only be used to pay for expenditures that constitute qualified capital costs, consistent with Oregon law. Capital costs are costs that can be capitalized under generally acceptable accounting principles (GAAP). Capital costs can include the costs of capital construction, capital improvements or other capital costs as defined by the relevant provisions of the Oregon Constitution and Oregon law (including ORS 310.140). Each grantee should refer to and abide by its own policies regarding what constitutes a capital cost.

As outlined in ORS 310.140, capital costs include land and other assets having a useful life of more than one year, and can include costs associated with acquisition, construction, improvement, remodeling, furnishing and equipping. Capital costs do not include costs of routine maintenance, supplies or general operating expenses.

Each grant recipient jurisdiction may, based on its financial policies, make its own determination as to what constitutes a capital cost, so long as it is consistent with state law. *The only reimbursable costs are related to the capital project plus up to 10 percent for project management staff time.*

3) GRANT MATCH REQUIREMENTS

Bond funds are not intended to cover 100 percent of the project cost. Grant recipients are required to cover a certain percentage of the project cost with non-Metro funds (meaning local share money cannot be used towards capital grants match requirements). Grant match requirements reduce risk in grant funding by ensuring that the risk of grant funding is spread amongst parties and that there is accountability for grant recipients to use grant funds responsibly. However, high match requirements also restrict grant programs to better resourced and more established applicants who can rally greater funding commitments while creating higher barriers to entry for newer and smaller applicants, presenting a significant challenge to equity-enhancing grant funding.

In order to broaden the pool of applicants as wide as possible and ensure equal access to grant funds beyond larger and better resourced jurisdictions and organizations, and to incentivize grant funding in higher need and underserved areas, the Capital Grants Pilot will use an alternative grant match requirement to previous Capital Grants funding rounds. This alternative is tiered based on equity criteria of prospective project sites and differentiated based on project budget, reflective of the differential risk associated with smaller compared to larger projects.

Grant applicants can determine their project's required local match percentage by referring to Appendix E: Match Requirement Map, which shows the census tracts of the project area, colored by tier. Given the census track containing the proposed project, the applicable grant match requirement would be the following:

Census Tract Equity Criteria	Small Projects ≤ \$100k budget	Large Projects > \$100k budget
Tier 1 (at least 4 equity criteria met)	1:4	1:2
Tier 2 (less than 4 equity criteria met)	1:2	1:1

Ex. 1: For a \$50,000 project in a Tier 1 tract, a Metro Capital Grant of \$40,000 would require an applicant to secure \$10,000 in matching funds.

Ex. 2: For a \$250,000 project in a Tier 2 tract, a Metro Capital Grant of \$125,000 would require an applicant to secure \$125,000 in matching funds.

Equity Criteria, % compared to Regional Ave.

- % People of Color, 2019: > 25.67% (regional tract average)
- % Change in People of Color, 2015-2019: > +2.11% (regional tract average)

- % Limited English Proficiency: > 6.44% (regional tract average)
- % Low Income (<200% poverty): > 25.31% (regional tract average)
- % Voter Turnout: < 83.03% (regional tract average)

Types of Match Allowed

- The match can be a combination of financial resources and in-kind services.
- The match needs to be identified and close to being secured at the time of application.
- The value of donated or acquired property can be used as a match if the property was donated or acquired within one year of the grant application, as long as no Metro funds were used to acquire the property.
- Volunteer time should be valued based on the Independent Sector's value of volunteer time. The 2022 value is \$29.95/hour. The most current information can be found at: <https://independentsector.org/value-of-volunteer-time-2021/>
- Metro funds or in-kind support of Metro staff cannot be used as a match.
- Match can include pre-agreement planning costs. It is recognized that some costs must be incurred to adequately prepare the full application. For that reason, the following costs can be included as a match if incurred after Metro's invitation to submit a full application.
 - For development projects: Professional services, agency staff time and volunteer time spent on the following activities: site planning, feasibility studies, preliminary design, environmental assessment, preparation of cost estimates, construction drawings and specifications, building relationships with potential partners and similar tasks necessary for project preparation.
 - For acquisition projects: Professional services, agency staff time and volunteer time spent on appraisals, survey, environmental evaluation costs and building relationships with potential partners.

C. AGREEMENTS

1) PURPOSE AND SUMMARY

This section discusses the contractual agreement, insurance requirements and reimbursement procedures with Metro after receiving a funding award. The agreement language provided here is for informational purposes only. Final agreement language will be provided during program implementation.

2) LEGISLATION GUIDANCE

The 2019 parks and nature bond outlined purpose, principles and criteria and minimum requirements to which the Nature in Neighborhoods Capital Grants Pilot must adhere. Those are listed below with explanations in italics.

What is the contract period for these grants?

Grantees will have up to two years to address these conditions of approval before entering into a grant agreement with Metro. Upon entering into a grant agreement with Metro, the grantee will have up to three years to complete the project. Metro's Chief Operating Officer may approve extensions up to a maximum five-year term if a project encounters unforeseeable delays. *Contracts are for three years. If contract extensions are needed, the COO must approve the extension and can do so for up to a maximum five-year term.*

What happens to unspent funding?

Nature in Neighborhoods capital grants projects funded by the 2019 bond measure must be maintained for their intended purpose established in the grant application, such as natural area, wildlife habitat, water quality, trail or recreation purpose. After five years, the Metro Council may reallocate unspent and unobligated funds to other program areas, up to any maximum program funding amount(s). Agreements for any public interest in land must be negotiated with willing sellers. Local governments may not exercise their powers of eminent domain in the implementation of this measure.

3) METRO RECOMMENDATIONS

Metro procurement determines contracts, reimbursements and insurance requirements.

Agreements

Metro staff will work with the successful applicant to enter into the necessary agreements for the project between Metro and the applicant and any partner (e.g. local government partner). There are three potential agreements that may be used.

- Intergovernmental Agreement (IGA): This template is used when the applicant is a government agency.
- Grant Agreement: This template is used when the applicant is a community-based organization.
- Government Sponsor IGA: This template is used for the government agency when the applicant is a community-based organization. It is used together with the Grant Agreement discussed above.

Metro staff will provide a first draft agreement to the grantee(s) based on Metro templates. Grantees may propose edits and once both parties are satisfied, the agreement can be executed.

Notice to Proceed

The only elements of the project that can be implemented and counted towards project expenses prior to fully executed agreements with Metro are those identified in the grant proposal budget as “pre-agreement costs.” These expenses can only be used as match, and Metro has no obligation to reimburse these expenses or enter into a grant agreement if all match funds are not secured or if all Metro Council conditions of approval are not met.

Changes to Scope of Work or Budget after Executed Agreement

Amendments to the agreement can be made to extend the grant period, make necessary budget adjustments or make other alterations that are still consistent with the project scope and conditions approved by the Metro Council.

If the need arises to redirect capital grant funding to a new project element that was not part of the original scope of work, the following criteria will be considered.

- The new project element addresses the same problem or need identified in the grant application.
- The originally funded project element is not feasible, was funded by some other funding source, or did not cost as much as anticipated at time of application.
- The new project element is consistent with the intent of the Nature in Neighborhoods Capital Grant program as defined by the 2006 natural areas bond measure.

The request must be approved by Metro’s Chief Operating Officer.

Reimbursements

Metro will reimburse the organization with which it has a Grant Agreement for approved costs listed in the Grant Agreement (contract) Scope of Work. The Scope of Work includes the project budget chart, including revenues and expenditures, and budget narrative submitted by the Grantee for the full application. Please see below or the contract for more detail:

- Metro cannot reimburse any costs incurred prior to or after the performance period of the contract.
- Metro will provide a cover sheet, reimbursement spreadsheet template and instructions on how to submit requests via the online platform, ZoomGrants.
- Upon execution of this Grant Agreement, Metro offers the option to pay Grantee thirty percent (30%) of the Award Amount with a signed request for upfront payment. Grantee must secure at least the required matching funds of the Initial Payment. Grantee will submit an Invoice and Itemized Statement of Expenses and Match form accounting for spending of both the Initial Payment (or any portion thereof), and the required match for the Initial Payment, **at least every six months** until Grantee has expended the entire Initial Payment and its match.
- **After the Initial Payment and its match has been expended and reported on, Grantee must submit reimbursement requests at least every six months.** With the exception of the Initial Payment, each of Metro's payments to Grantee will equal Grantee's fees, costs, and expenses incurred for that portion of the Scope of Work Grantee accomplished during the billing period, and Grantee will maintain and demonstrate match spending and in-kind donations based on their required match. Match may exceed the requirement and Metro will consider all match approved to date when reviewing requests for reimbursement.
- **Grantee must submit a reimbursement request or good faith estimate of expenses expected to request for reimbursement by July 10 annually** for expenses incurred through June 30 of the same year to meet Metro accounting requirements.

Grantee must submit an annual financial report (separate from the reimbursement request) outlining expenses by category on or before July 31 of each year during the term of the contract, beginning in the year Metro first provides a disbursement of any portion of the funds to grantee for a project, grantee will prepare a financial report using a template provided by Metro. The Annual Financial Report will contain (A) an itemized list of grantee's expenditure of bond funds through the end of the applicable fiscal year and the prior fiscal year, (B) a certification from Park Provider to Metro that the bond funds were used only to pay for Capital Costs and the Capped Project Costs do not exceed the 10% cap. Grantee may submit match above the minimum amount at any time. Metro will track payments and match over the life of the grant and review the match requirement as an overall amount compared to the outgoing payments, not by each request. Therefore, grantees can 'pre-stack' match and later submit requests without match and still receive payment. Grantees can reach out to the Grants and Contract Coordinator, **Oriana Quackenbush**, oriana.quackenbush@oregonmetro.gov at any time to check on their payment to match ratio or other questions related to payment.

With respect to each reimbursement, Metro will pay Grantee within fifteen (15) days of receipt of complete documentation and Metro's approval of that documentation. Grant staff will contact Grantees promptly with any questions or concerns if a reimbursement request cannot be processed as submitted. The 15 day turn around begins once a reimbursement request is approved and ready to be processed.

- Notwithstanding the foregoing, Metro may withhold ten percent (10%) of the maximum Award Amount until the final report and final reimbursement request is submitted by Grantee and approved by Metro.
- Fees, costs, and expenses associated with substitutions or changes in the project that have not been approved by Metro are not eligible for reimbursement. For this reason, we recommend reaching out to Metro staff to discuss

budget change needs ahead of spending and requesting reimbursement. Metro staff are able to review and approve most changes without amending the contract so it is usually a quick process. We want to be able to support your shifting needs, but need to be aware and to be able to raise any concerns in advance as we don't want you to spend funds we can't reimburse.

Insurance requirements and W-9

In order to complete the Grant Agreement, the Grantee must submit to Metro their W-9 form (if not previously submitted) and current certificates of insurance **with endorsements**. Metro cannot execute the Grant Agreement until it receives this documentation. Please see below for more detail:

- Commercial general liability insurance covering personal injury, property damage and bodily injury with automatic coverage for premises and operation and product liability with a minimum of \$1,000,000 per occurrence is required. The Agreement is conditional upon review and approval of Metro's Risk Manager. Grantee must provide Metro with a certificate of insurance and endorsements that names "Metro, its elected officials, departments, employees and agents" as **additional insured**.
- Automobile bodily injury and property damage liability insurance with a minimum of \$1,000,000 per occurrence. If this is not included in your general liability certificate of insurance, a separate certificate will be needed. *If you do not use vehicles and/or do not transport participants as part of your program or project, and therefore don't carry this insurance, please reach out to us via email so we can discuss waiving this requirement with Metro's risk manager.*
- Proof of worker's compensation insurance is required for agencies with staff. *A worker's compensation exemption form (provided by Metro) is required for those without staff or who are otherwise exempt from carrying this insurance.*
- Certificates of insurance do not need to be original hard copies. They can be emailed in by the agencies named on the Grant Agreement or by their insurance agents.
- Certificates of insurance are usually issued annually, the grantee or their insurance agent must send updated certificates meeting the standards above throughout the term of the Grant Agreement.
- A W-9, provided by Metro, completed by the grant agency receiving payment (Applicant agency or if there is a fiscal agent, that agent's W-9) is required if this is their first Grant Agreement with Metro to enable payments through Metro's accounting system. An updated W-9 may be required if the organization name or payment address has changed since the original submission,
- (Optional) An ACH form that enables Metro to make payment directly to your bank via transfer instead of mailing a paper check.

D. GRANT MANAGEMENT

1) PURPOSE AND SUMMARY

This section describes how the projects will be monitored and evaluated after receiving a funding award. These agreements provided here are for informational purposes only. Final agreement language will be provided during program implementation.

2) LEGISLATION GUIDANCE

The 2019 parks and nature bond outlined purpose, principles and criteria and minimum requirements to which the Nature in Neighborhoods Capital Grants Pilot must adhere. Those are listed below with explanations in italics.

How will the Capital Grants Pilot be accountable?

An independent community advisory Committee will review progress in the implementation of Metro's bond measure, including protection of land, local and community project implementation, capital construction of Metro park and regional trail projects, and grant program administration. This Committee, the Natural Areas and Capital Program Performance Oversight Committee, gives the Metro Council and the region's residents an independent, outside review of the capital program. The Committee's charge and responsibilities will include oversight of Metro's efforts to meet the racial equity and climate resiliency criteria and outcomes described in this measure. *According to the Oversight Committee Bylaws, the Oversight Committee will provide general oversight and review whether bond programs are run efficiently and whether bond programs meet the bond goals and bond criteria, they will not necessarily be reviewing individual bond funded projects.*

3) METRO RECOMMENDATIONS

Measurements

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.

In particular, Metro parks and nature bond staff worked with a contractor, Dialogues in Action, for a year and a half to establish program outcomes and corresponding evaluation tools, interview questions and a survey for the Program Design and Review Committee and in the future participating community members in idea collection, project development and community votes.

Reporting requirements

Grant recipients will be required to report on the progress and outcomes of the project throughout the project period. A final report will be required that includes full and final accounting of all expenditures, the value and source of matching funds, a description of work accomplished, volunteer hours and participation, Project photos (including a photo of the signage acknowledging the Nature in Neighborhoods Capital Grants Program participation), and data on success indicators. Such success indicators will be determined on a project-by-project basis and included as part of the grantee's scope of work.

Metro is committed to successful project implementation for all grant recipients and will work cooperatively to ensure project success.

Progress and Final Reports

Reporting on how well the Capital Grants Pilot meets its purpose and delivers on the intended goals will strengthen accountability with voters and the larger community in the Metro area.

Therefore, grantees will submit project progress reports every six months, an annual financial report, and one final report upon project completion. Metro staff is working to include Metro Bond overall measurements into the reporting mechanisms above. If that is not feasible grantees may also be asked to submit an annual outcomes and impact report to contribute to Metro's overall reporting on intended goals Unless otherwise amended, the Grant Agreement or IGA (contract) Scope of Work is the Grantee's Nature in Neighborhoods full grant application, which serves to define the goals, methods and measures for reporting.

The six-month project progress reports and final report will include a summary of grant activities, the actual total budget and in-kind matching contributions, photos, follow-up activities, and an assessment of the project, including a descriptive qualitative story and quantitative evaluation measures.

At Metro's discretion, Metro may withhold ten percent (10%) of the maximum Award Amount until the final report and final reimbursement request is submitted by Grantee and approved by Metro. Any Grantee that fails to submit a final report as required by the Grant Agreement is ineligible to apply for additional Metro grant funds until the report is submitted.

Six-month project progress report (2-5 pages)

Project progress reports provide the Grantee and Metro an opportunity to reflect on the program or project's activities, outcomes, and progress every six months. Using ZoomGrants, please report your program or project's progress by answering the questions to describe your program or project, outcomes and partnerships in a clear and concise manner. Please also upload high-quality promotional photos of the program or project, materials and activities for use in Metro publications and on Metro's website.

Final report (5-8 pages)

At the completion of the project or the Grant Agreement expiration date, the final report provides the Grantee and Metro a chance to review the program or project's activities, outcomes, challenges and successes. This report takes the place of the six-month project progress report at project completion.

Using ZoomGrants, please answer the progress report questions and a few additional questions to describe your project narrative, outcomes, partnerships and follow-up activities in a clear and concise manner. Please also upload digital photos and materials created. Your final report will be the permanent record of your project at Metro.

Visits

To help Metro better understand your grant-funded project, the grants program manager would like to schedule a time to visit it. Please identify an event, significant project phase or other opportunity for the grants program manager to visit and observe your great work. Email the program manager or include it in your progress report.

Media and Promotions

Do you have upcoming fundraising event, community day or a call-to-action for your Metro funded project? Were you recently featured in the news? Please include them in your progress report or send the grants program manager an email with photos, videos or website links! When you announce events on social media, please include **@OregonMetro** so that Metro can easily re-tweet on twitter or share on Facebook your announcements. To see recent examples on Facebook and Twitter, check out the hashtag **#SupportMetroGrantees**.

Metro's Nature in Neighborhoods Capital Grants are supported by the parks and nature bond approved by the region's voters in 2006 and renewed in 2019. Metro would like to draw attention to the visible aspects of Metro-supported grant programs or projects to demonstrate to the public how these funds are being used in their communities and to generate ideas for future grant applications. Therefore, we would like to help to promote your project through Metro's social media, media stories, stories posted to Metro's website, Metro's online and print newsletter Our Big Backyard, and other communications activities.

Acknowledgement of Metro as Funding Partner

As part of this grant, please acknowledge Metro as a supporter for your project when and where possible. This includes, but is not limited to, newsletters, social media, signs, event mailings, annual reports, print or film media, websites and news releases.

For social media, including Facebook, Twitter or Instagram, please include **@OregonMetro**, **www.facebook.com/oregonmetro**, or **www.oregonmetro.gov**.

For written material, please include the **Metro logo**. Contact Metro staff with your request so we can provide the best version for your needs.

- a) Grantee will (1) coordinate with Metro in selecting the date and time for any event recognizing, celebrating or commemorating any Project ground-breaking, completion, ribbon cutting or opening, and provide Metro an opportunity to participate, (2) recognize the Measure as a funding source at any such event, and (3) provide a speaking opportunity for the Metro elected official representing the district in which the project is located, if such opportunities are provided to Park Provider or other public officials.
- b) Grantee will recognize Metro and the Measure in any publications, media presentations, or other presentations relating to or describing projects receiving Allocated Bond Funds. Such project recognition will be included on on-site documentation, for example signs, and in any published final products and visual presentations, web site information, collateral materials, newsletters, and news releases.
- c) At or before completion of any project, Grantee will install permanent signage at the project site in prominent and highly visible locations near each primary public access point or viewing access area and not located in a manner that would have a detrimental impact on any natural area view shed. The signage will acknowledge Metro's funding of the project and any other partners that have provided funding. Signage will (1) be a standard, free-standing sign provided by Metro, which Metro will make available to Grantee upon request at no cost to Park Provider, or (2) include Metro's logo and script in other signage, with Metro's logo and script of a size in comparable proportion to the relative amount of funding provided by the Measure for the project being recognized, in relation to other agencies recognized on such signage. Metro's logo and script should not be larger than the logo and script of Grantee. Metro will make its graphics available upon request at no charge to Park Provider.
- d) When Grantee opens the project to the public, Park Provider will plan and hold at least one community/media event to publicize the project and its relationship to the Measure. Grantee will provide the Local Share Program Manager with written notice of such event at least four (4) weeks before the scheduled event to coordinate with and allow for participation by Metro staff and elected officials.