



Large-scale Community Visions Program Handbook

2024 Cycle Two Program Process

Program Summary

The Metro Council seeks to inspire innovative capital projects that improve the coordination of ecological restoration, provision of housing, safety of transportation and workforce creation in the Metro region. This can be accomplished through the development or restoration of outdoor, natural spaces that are or will be in public ownership.

For this 2024 second cycle of the Large-Scale Community Visions Program, there is approximately \$10 million of Program funding available. The Large-Scale Community Visions Program funding is made possible thanks to Metro's voter-approved 2019 Parks and Nature Bond Measure.

Minimum Eligibility Requirements

Projects must meet the following minimum requirements to be eligible for funding:

- The project must be a capital project and grant funds may only be used to pay for capital costs.
- The project must result in a publicly owned capital asset.
- The project must be located within Metro's jurisdictional boundary.
- In addition to the nature uplift, the overall project must also include components that address housing, transportation, or workforce development.
- The minimum project award is \$1,000,000 and must have a 1:1 match for nature uplift, as well as an overall project match of 1:2.

For the full list of eligibility requirements, please see pages 10-11.

Application Review Process & Schedule

Cycle two of the Large-Scale Community Grant Program will review letters of interest and applications on a rolling basis. Interested applicants should submit a letter of interest. Full applications will be accepted by invitation only. Metro anticipates that initial awards will be made in late Spring 2024, and subsequent awards will be made until funding is exhausted. The anticipated timelines may be adjusted, in Metro's sole and absolute discretion.

For more details regarding the schedule, please see pages 7-8.

Table of Contents

Program Summary	2
Minimum Eligibility Requirements.....	2
Application Review Process & Schedule	2
Program Overview	5
Background	5
What is a large-scale community visions project?.....	5
Funding Availability.....	5
Who can apply?.....	5
Public/Private Partnerships	5
What can this Program fund?	5
Qualifying Capital Improvement Projects	6
Where can eligible projects be located?.....	6
What are eligible costs?	6
Are land acquisition costs eligible costs?.....	6
Program Eligibility and Application Process.....	7
Eligibility Requirements	7
Application Process.....	7
Letter of Interest.....	7
Applications.....	8
Application Evaluation Criteria	8
General Bond Measure Principles.....	8
Community Engagement and Racial Equity Criteria	8
Climate Resiliency Criteria	8
General Program Criteria	9
Match Requirements	9
Qualifying Match.....	10
Application review process	10
Metro Council Awards	10
Required Grant Funding Agreements	11
Public Records and Confidentiality	11
Public Information Subject to Disclosure.....	11
Confidentiality of Application Materials	11

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Program Overview

Background

On November 5, 2019, voters across the Metro Area approved the 2019 Bond Measure to Protect and Connect People to Nature, thereby creating six bond measure programs that fund natural area and water quality protection and connect people to nature. The Large-scale community visions program (referred to herein as the “Program”) is intended to provide funds to help deliver significant investment in habitat preservation, restoration, and access to nature in coordinated and visionary capital projects.

What is a large-scale community visions project?

A large-scale community visions project is a capital investment that uplifts community by returning natural environment to a central role in projects that seek to address affordable housing, safe, reliable transportation and workforce development. A large-scale community visions project is a transformative local project of regional significance that increases access to nature for people in urban areas and/or improves the resilience of urban natural areas. By leveraging public and private investments, a large-scale community vision project will also support improvements in affordable housing, transportation, and workforce development.

Funding Availability

This second cycle of Program funding will make up to \$10 million available for eligible projects.

The minimum grant amount is \$1,000,000 and the maximum grant amount is \$10,000,000.

Who can apply?

The following groups and organizations are eligible to apply: tribal governments, nonprofit organizations, public entities, public education institutions, community colleges, universities and extension centers, and private real estate developers. Projects require a public-private partnership and must demonstrate alignment with community driven projects that will catalyze investments in the community where they are located.

Because the Large-scale community visions program is funded by general obligation bonds, the land or other capital assets acquired or created with Program funds must be owned and capitalized by a state or local government entity. As such, applicants must demonstrate the existence of a public-private partnership by submitting a letter of support from the state or local government entity expressing a commitment to owning and capitalizing the bond-funded asset.

Public/Private Partnerships

The project must include both a public and private partner that will collaborate to deliver the project. To be considered a “partner”, each entity must be financially invested in the project and responsible for at least 5% of the total project budget through in-kind services to make the project a success.

What can this Program fund?

This Program funds capital projects that result in a publicly owned capital asset within Metro’s jurisdictional boundary. Program funds may only be used to pay for expenditures that constitute qualified capital costs, consistent with the Oregon Constitution and federal tax law.

The definition of a capital asset may vary depending on how the project will be accounted for by the public partner agency. Ultimately the public partner agency will be obligated to confirm that the capital asset is properly recorded in the jurisdiction's audited financial statements.

Qualifying Capital Improvement Projects

Projects must have complementary elements of either housing, transportation or workforce development. While these pieces do not need to be contiguous, there does need to be a unifying nexus that illustrates the connectivity, vision, and desired outcomes of all project pieces.

There are three types of capital projects that may be funded through the Large-scale community visions program.

Restoration projects: Create or renovate an asset to enhance fish habitat and/or wildlife connectivity such as enhancing stream complexity with large woody debris, remove or replace culverts to enhance fish passage and habitat, provide viewing platforms to reduce people's impact on sensitive habitat, expand tree canopy and the like.

Urban transformation projects: Seek to shift the balance of marginal urban land use toward natural environment in the region's most urban settings by deindustrializing underutilized sites, removing environmental contamination or hazards to create or improve habitat, expanding tree canopy, and/or by doing ecological restoration that shifts marginal urban nature toward sustainable natural area nodes.

Neighborhood livability projects: Seek to connect people to existing natural areas in ways that minimize negative impacts on natural habitats and their functionality, including but not limited to expanding the tree canopy.

Where can eligible projects be located?

Projects must result in a publicly owned capital asset within Metro's jurisdictional boundary.

What are eligible costs?

Program funds may only be used to pay for expenditures that constitute qualified capital costs, consistent with the Oregon Constitution, federal tax law, and the participating public partner's accounting policies. Capital costs are costs that are considered capital under generally accepted accounting principles and may include the costs of capital construction, capital improvements and land acquisition.

Funds cannot be used for overhead costs, indirect costs, routine maintenance or general operating expenses. Eligible costs do not include project planning, scoping, engagement, feasibility studies, and other preliminary project development costs. However, these costs can be used to meet the Program's matching requirements set forth below on pages 9-10.

No more than 10 percent of Program grant funds may be used for staff time directly related to a project.

Are land acquisition costs eligible costs?

Land acquisition will only be considered for Program funding if the acquisition is part of a larger capital improvement project. Acquisition is limited to natural areas, wildlife habitat and trail corridors, nature-related parks or other opportunities for increasing people's connection to nature and/or restoring ecological systems. Capital improvement projects with a land acquisition component must include the strategy for planning and developing the overall capital project.

Land acquisition costs could include costs necessary to return the parcel to a natural state for wildlife preservation/enhancement and conservation purposes (e.g costs for land surveys, demolition of unwanted structures and hazards, and the initial removal of invasive species and planting of native vegetation).

Program Eligibility and Application Process

Eligibility Requirements

A Large-scale community visions project must meet **all** of the following criteria:

- ☐ Be located within Metro's jurisdictional boundary
- ☐ A committed public partner that will ultimately own and capitalize the asset paid for with Program funds
- ☐ Identify as a qualifying capital improvement project (restoration, urban transformation, or neighborhood livability)
- ☐ Minimum nature uplift component of \$2 million (which may include the Program grant amount)
- ☐ Complementary investments in affordable housing, transportation or workforce development
- ☐ Meet the 1:1 nature uplift match requirements (*see pages 9-10 for details*)
- ☐ Meet the 1:2 overall project match requirements (*see pages 9-10 for details*)

Application Process

This Program will accept letters of interest from interested applicants on a rolling basis. This means that you can submit a letter of interest when your project is ready. Metro anticipates doing monthly reviews and announcing selections as soon as practicable after the review process is complete. Full applications may only be submitted by invitation.

Letter of Interest

Potential applicants who have a project that meets the eligibility requirements must first submit a letter of interest. Letters of interest can be submitted at any time and should address the following:

- Description of the project and how it meets the definition of a Large-scale community visions project.
- How is habitat restoration central to your project?
- What is the estimated cost for the overall project and the initial estimate of requested Program grant amount? How do you expect the Program grant amount to catalyze other funding?
- What is the estimated timeline for the project and the spend-down of grant funds?
- If you are a non-public entity, please identify your committed public partner.
- If you are a public entity, please identify your committed non-profit/community/private partner.

Metro staff will review the letter of interest to ensure it meets the minimum eligibility requirements. This review will likely include follow-up communication with the applicant and/or requests for additional project information. If Metro staff determines that the project meets the minimum requirements of the Program, the applicant will then be invited to submit a full application and will be provided with feedback on how to strengthen the application to be more competitive.

Applicants should also refer to the Application Evaluation Criteria to learn more the Program's principles and criteria requirements. Metro Program staff will be available to applicants to assist in providing clarity about Program goals and requirements while the applicant develops a full application.

Applications

Full applications will only be accepted from applicants who have been invited to apply. Full application instructions will be sent with the invitation to apply.

Application Evaluation Criteria

Full applications will be evaluated on the information submitted, as well as alignment with the general Bond Measure principle and the Program's purpose, criteria and match requirements.

General Bond Measure Principles

The following bond measure principles guide the Program in its selection of grant investments. Full applications should address which of the principles below are incorporated into the proposed project.

- ☐ Serve communities through inclusive engagement, transparency and accountability
- ☐ Advance racial equity through bond investments
- ☐ Protect clean water for people, fish and wildlife
- ☐ Protect and restore culturally significant native plant communities
- ☐ Protect, connect and improve habitat for native fish and wildlife
- ☐ Make parks and natural areas more accessible and inclusive
- ☐ Connect more people to the land and rivers of our region
- ☐ Invest in trails for biking and walking
- ☐ Support community-led parks and nature projects
- ☐ Make communities more resilient to climate change

Community Engagement and Racial Equity Criteria

Program funding is only available to projects that satisfy community engagement and racial equity criteria. Full applications must describe how the following criteria will be met:

- ☐ Meaningfully engage with communities of color, Indigenous communities, people with low incomes and other historically marginalized communities in planning, development of project
- ☐ Prioritize needs identified by communities of color, Indigenous communities, low-income and other historically marginalized groups.
- ☐ Provide data that will support tracking outcomes and reporting impacts, particularly as they relate to communities of color, Indigenous communities, people with low incomes and other historically marginalized communities.
- ☐ Include strategies to prevent or mitigate displacement and/or gentrification resulting from project 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 Resiliency Criteria

Projects must satisfy **at least one** of the following climate resiliency 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 storm water to protect vulnerable communities from flooding.
- ☐ Increase tree canopy in developed areas to reduce heat island effects.
- ☐ Use low-impact development practices and green infrastructure in project design and development.
- ☐ Invest in segments of the regional trail system to expand active transportation opportunities for commuting, recreation and other travel.

General Program Criteria

Projects must meet one or more of the following general Program criteria:

- ☐ Improve access to nature for people.
- ☐ Protect and reclaim rivers, increase tree canopy and/or restore or improve other important natural features in urban areas for the benefit of people and wildlife.
- ☐ Create access to nature in a regional or town center, employment area or other areas identified as a priority for investment in Metro's 2040 Growth Concept.
- ☐ Foster partnerships between public agencies and between the public and private sectors and/or catalyze private investment by focusing public investments and efforts on specific priority projects.
- ☐ Meet a need identified by communities of color, indigenous communities, people with low incomes and other historically marginalized communities.
- ☐ Complement investments in affordable housing and transit or active transportation projects.
- ☐ Catalyze other investments in transformative regional-scale projects that increase access to nature for people in urban areas and/or improve the resilience of urban natural areas.
- ☐ Leverage with public/private investments in affordable housing, transit and connections to local or regional parks.

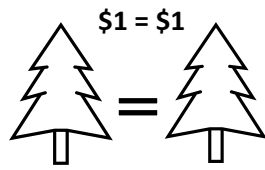
Match Requirements

Projects that foster partnerships between public agencies and between the public and private sectors and/or catalyze private investments by focusing public investments are strong candidates for Large-scale community visions program funding. Projects that leverage additional government and private funding to increase the overall program impacts are desirable candidates for Program funding.

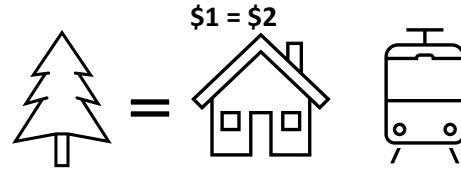
Awarded funds for the nature uplift/habitat restoration element of projects require a 1:1 match, meaning the project must match \$1 for every \$1 of Program grant funding. As these projects are meant to be large scale, innovative, and multi-benefit, an overall project match of 1:2 is also required, in order to ensure additional investments are catalyzed and leveraged.

So for example, if a project is awarded \$1,000,000 in Large-Scale Community Visions Program funding, there must be a 1:1 match, meaning there must be a minimum of \$2 million total invested in nature uplift. The overall project must also have at least a 1:2 match, meaning that the overall project must demonstrate a match of \$2 for every \$1 of Large-Scale Community Visions Program funding. Metro Program funds may not exceed one-third the total estimated project costs.

1:1 nature uplift match



1:2 overall project match



Ideally, match would be identified and committed at time of the letter of interest. However, Metro may consider applications and the award of funding to projects with conditions of approval, including the need to meet matching requirements.

Qualifying Match

Requirements and limitations for matching funds are as follows:

- The match can be a combination of financial resources and staff time.
- 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.
- Metro funding (from programs other than the Large-Scale Community Visions Program) or staff time cannot be used as a match.

Application review process

Staff review: Metro staff will review full applications for eligibility and completeness as they are submitted.

Application scoring: Metro staff will evaluate each full application according to project's strength of alignment with Program criteria outlined in this handbook. Additionally, staff will identify conditions of approval necessary to ensure the proposed project meets the minimum required Program goals.

Site visits: As needed, Metro staff will conduct site visits during the application review period. Site visits are intended to provide a more in-depth understanding of the application in order to form a stronger basis for comparison with other applications. All site visits will be documented for inclusion in presentations of materials to Metro Council.

Notification to applicants: Applicants will be informed of the staff's evaluation and scoring. The applicant will have the opportunity to discuss the conditions of approval and confirm their ability to meet those conditions.

Only projects with mutually agreed to conditions of approval will be submitted to Metro Council for consideration.

Metro Council Awards

The Metro Council will select projects and make all awards of all Large-scale community vision funding allocations. In making a decision, the Metro Council will review staff evaluations, site visit analysis, conditions of approval, and any other relevant information. The award of funds will be made to projects that best advance the vision, goals and intent of the Large-Scale Community Visions Program, in the Metro Council's full and absolute discretion. Projects may be funded in full, projects may receive funding lower than requested in the application, or projects may not be awarded funding at all. The total maximum grant award is \$10,000,000.00.

Required Grant Funding Agreements

While the Metro Council does announce grant award decisions publicly, the disbursement of funds to a recipient is contingent on the execution of a final grant funding agreement and compliance with all grant requirements contained in that legal contract. The Program grant funding agreement will outline all terms and conditions of Metro's funding commitment and will serve as the binding agreement for both parties as to the scope and quality of work and the amount of funds committed. Metro has no obligation to disburse any funding to any recipient until a grant funding agreement is fully executed by the parties, including both the public and private partner. Terms and conditions related to insurance, indemnification, reporting, general obligation bond funding requirements, and all other applicable provisions of law (including but not limited to prevailing wage for public works) will be covered in the grant funding agreement.

Public Records and Confidentiality

Public Information Subject to Disclosure

All letters of interest and applications are considered "public records" and are subject to Oregon Public Records Law. All documents and information submitted as part of your application may be deemed public records subject to public disclosure under the Oregon Public Records Law. Any member of the public has the right to request the documents and information you submit as part of your application.

Confidentiality of Application Materials

Before submitting confidential information to Metro, you must notify the Program's grant manager in writing that you intend to submit confidential information to Metro as part of your application. If after consulting with the Program's grant manager, you determine that it is necessary to submit confidential documents and information to Metro, you must identify, highlight, and segregate any information that is identified as "confidential" from information that is not confidential. You must also identify applicable exemptions under the Oregon Public Records Law that permit Metro to withhold the confidential documents and information from public disclosure. Information that you have not properly marked as confidential may be disclosed by Metro in response to a public records request.

Metro makes no warranty or representation as to the confidentiality of your application documents or information submitted to Metro regardless of whether the documents or information you submit are identified as confidential. Documents or information you identify as confidential may be disclosed by Metro if Metro determines, in its sole discretion, that the documents or information are subject to disclosure under Oregon public records law. In the event Metro receives a public records request applicable to your documents or information, Metro will make an independent determination regarding exemptions that may apply to documents or information properly marked as confidential in your application. By submitting your application, you acknowledge and agree that all application documents and information you submit to Metro may be subject to public disclosure in the event of a public records request (1) upon Metro's determination that your documents or information are subject to disclosure under public records law, (2) upon an order of the Multnomah County District Attorney, or (3) upon an order of a court. Because Metro cannot give you legal advice, you should consult your legal counsel regarding the applicability of Oregon Public Records Law to your documents and information submitted to Metro.