

Agenda



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Meeting: Natural Areas and Capital Program Performance Oversight Committee
Date: Tuesday, April 25, 2023
Time: 4:00–6:00 p.m.
Place: Zoom:
<https://us02web.zoom.us/j/86983166949?pwd=UlpEc3daUGk3QVA0V2UvUnQ3Q1ovUT09>
Webinar ID: 869 8316 6949/ Passcode: 655881 / +1 253 215 8782
Purpose: Refine year 2 report: deep dive on Parks and Nature bond's local share program
Note: Public testimony will not be heard at this meeting; however, the committee accepts written comments. Please email parksandnaturebond@oregonmetro.gov

4:00 p.m. Welcome and introductions
4:05 p.m. Committee business reminders
4:10 p.m. *Discussion item:* Committee working groups report out
4:40 p.m. *Discussion item:* Refining year 2 report
5:10 p.m. *Informational item:* Parks and nature bond local share program
6:00 p.m. Adjourn

* According to the Oregon State Legislature's House Bill 4212, all meetings that are subject to public meetings law and conducted with telephone or video conference tools that allow recording are required to be recorded and posted for accessibility by the public. This requirement ends 30 days after the Governor's emergency COVID order, and any extension of the declaration, is no longer in effect.



Meeting minutes

Meeting: Natural Areas and Capital Program Performance Oversight Committee
Date/time: April 25, 2023, 4:00 – 6:00 p.m.
Place: Virtual meeting (Zoom) recording link in notes
Purpose: Refine year 2 report: deep dive on Parks and Nature bond's local share program
Note: Public testimony will not be heard at this meeting or in the breakout sessions; however, the committee accepts written comments. Please email parksandnaturebond@oregonmetro.gov

Committee Members:

Burt Edwards
Georgena Moran
John Ferguson
Michelle Lin
Martita Meier
PK Melethil
Tabitha Palmer DuPrau
Cary Watters
Vivek Shandas
Shannon Shoul
Erin Upton
Owen Wozniak

Absent

Tana Atchley Culbertson
Shantae Johnson

Staff:

Linda Bartolini Venegas
Beth Cohen, Metro
Chantia Clarke, Metro
MG Devereux, Metro
Melanie Reinert, Metro

Council Representatives:

Councilor Ashton Simpson, District 1
Councilor Gerritt Rosenthal, District 3
Councilor Mary Nolan, District 5

Recording: <https://vimeo.com/821334755>

Co-Chair Cary Watters facilitated the meeting and began with introductions, meeting logistics and updates.

- The Co-Chairs have been meeting with staff to prepare for this meeting and for the year 2 report work.
- Cary found the case study at last meeting to be helpful and asked for feedback from the committee.

MG provided shared potential meeting topics and activities planned for 2023 based on committee interest and feedback. (*refer to slides*)

- MG clarified that the year 2 report is not completed yet and sections of draft were shared with committee, and today's meeting time can be used to work through concepts and drafts with the committee's input.
- The next full committee meeting will likely be in September 2023. An optional personal site visit is possible in early August, and we will continue to invite members to tours,

celebrations and events whenever possible.

PK asked about the possibility of in-person meetings for the committee in the future.

- MG explained that Metro logistics and policies are being updated to allow for that, likely with hybrid meetings being possible to accommodate members who cannot attend in-person. This is likely to be an option by the end of the year.

MG outlined public testimony procedures and noted none had been received for this meeting.

MG shared that Metro Council participated in a work session this morning to discuss the next steps for the three applications received for the bond's large scale community visions program (Trust for Public Land, OMSI/CRITFC/Prosper Portland, and Albina Vision Trust each submitted a proposal).

- Council discussed the program moving forward after this pilot round. Linda Bartolini Venegas has joined the team as the large scale community visions program manager.

Staff are still working with the Metro Auditor on the audit process for the early setup of the bond, and they have indicated that access, how access is defined and measured through the bond efforts is going to be a key focus for the audit report. This is in line with the questions from the land acquisition and community engagement work groups. We will update on their findings and recommendations.

MG invited members to share any work or involvement that would be relevant to share in context of their role as committee members and any updates.

- Owen, Board of Directors President for the Intertwine Alliance reminded the group that the Intertwine Alliance Summit is happening on May 3 with registration closing at the end of the week. He encourages members to attend.

Cary shifted discussion to the report outs from the three working groups and asked the members to consider topics and questions that overlap in the groups.

- A Miro board link for additional committee feedback was shared in the chat for everyone to observe or participate as desired. The board will be shared in the meeting packet.

Owen reported for the land acquisition group on April 12 (*refer to additional notes in meeting packet*).

- The group reviewed a draft of the land acquisition component of the year two report including charts, graphs and figures.
- There have been eleven acquisitions. The bond acquisition program is ramping up, hiring staff, and it is still early in overall volume expected throughout the program.
- The group concluded that the committee's job is to provide oversight and render judgment on the effectiveness of the project, but it is premature to state whether this is a success or not, as the volume of transactions is not there yet.
- They recognized that the bond refinement was a more complex process than previous measures due to the different context and goals. The overall sense is that there is a desire to use the year two report to provide context and a window for the public into how this program functions, as it's a different undertaking than in the 2006 bond. A lot of large parcels, and low-hanging fruit has already been acquired and staff are now working on connectivity and footholds in newer target areas such as Abernathy.
- The report should provide benchmarks to demonstrate to committee and the public that staff is or is not on track and what the external conditions are that affect the work. The real

estate market has impacts as properties are not on the market and require owner engagement. Balance between detail of outreach and scale of outreach (percentages).

- Assessing the viability of purchases for a certain percentage of properties, ability to go through list of leads within a certain timeframe. The group felt a strong need to provide public context an indication of how the process is going and why it is going that way. More judgment can be made with more volume of transactions and apparent trends in the future.

PK liked the chapter and two-pager format and pointed out the initial page statement notes acquisition of 500 properties so far. He asked if the committee could look at the full portfolio of acquisitions at the same level as the 11 acquired in the 2019 measure. He noted the importance of educating and informing committee members and staff as well, as there will be turnover.

Owen referenced the GIS-based online map that is being created by Metro staff to show spatial information about bond investments. Data and information will be fed into that to make investments transparent and allow for storytelling. Owen liked the map and noted the Metro map that exists has a lot of information. He recognized the need to protect natural areas not meant for direct public access but saw opportunity to showcase the amount of work and story of the entire acquisition portfolio.

- Staff had also offered to share more raw data and the rough rubric used to evaluate potential acquisitions against bond criteria, which members felt would be useful.

John discussed the map's colored dots and what would members want to see as a summary available at each dot. Some of that information might be available. Parks and Nature's recent Our Big Backyard had a storytelling article about North Coffee Creek Lake Wetlands with a sidebar snapshot of the property's details and an aerial map showing location and connections. The summary in the snapshot could provide the necessary information to anyone who clicked a dot on the map.

Owen felt the committee didn't want staff to dig for new information. Much of the information desired to be spotlighted is already there. Committee can think about how to streamline the display of that and make it accessible.

- The working group will continue to suggest display and storytelling opportunities on the map. Owen would like the work group to convene again after reviewing the information from staff.

Cary included some questions on the Miro board (*refer to board graphic below*).

Tabitha reported for the working finance work group (*refer to notes*).

The finance group also discussed the map and then the year two report during their meeting, overlapping the land acquisition group discussion.

- They suggested a breakdown of acreage / average as a measurement as well as the number of acquisitions and show the strategic importance of each acquisition in relation to the bond goals within the map.
- The bond spends money in partnership with local communities, money awarded but not spent (e.g. Tualatin Parks project to be reimbursed). Showing committed funds and spent funds can show progress being made.
- Technical suggestions from an equity viewpoint included considering using contract equity instead of COBID, participation instead of utilization and showing a breakdown of some

spending or support of different minority or woman-owned business by identifying the group (minority, woman, both minority and woman, etc.)

- Keep consistency in the voice throughout the report (passive versus active).

Cary shared question on how to present on equity performance while early in the bond, considering past bond reports and those past milestones.

PK asked if details in the protect and restore land snapshot will cover the technical details of the 11 acquisitions and how they fit the three bond criteria. He noted it's the only document in the meeting materials that outline details on the acquisitions and related habitats, target areas. Is this the best document for committee to refer to when seeking details?

- Beth explained the snapshots are reflecting committee desire for the overview of the programs, and the year-two report will contain details about the acquisitions. We can incorporate the committee feedback for more context of where the program has been and where it will go and what challenges it has encountered.
- The snapshot shows how the acquisitions meet the climate resilience criteria. There is also a separate snapshot for the criteria themselves in addition to the program snapshots which contains some additional information.
- PK flagged that the report on dollars spent stabilizing property acquisitions has numbers with G-identifiers that are not explained and requested a key for those.
 - Staff are working on this and plan to include that context.

Erin reported on community engagement's discussion (*refer to separate notes*).

They reviewed the meeting materials on the year 2 report and focused on comprehension, framing and clarity from the viewpoint of the public.

- They wanted to understand bond criteria at a high level and how those connect to the program area work and one another.
- The group liked the deep dive into the case study and felt there was excellent content.
- Suggested adding in a reflection on what has been learned with engagement work over the past year (what was successful / what was not).
- Legibility and accessibility were considered (fonts, colors, hyperlinks).
- The group reviewed the map and saw potential there. They considered universal accessibility for the tool and how that could be addressed.

Burt thought it was important for Metro to underscore and define what community engagement is for the bond. Who is community? What is meaningful engagement, community impact, we need to clearly define these before someone does it for Metro.

Beth reiterated Burt's suggestion to look at the topline snapshot for each focal area for the committee and that the groups could have their findings and a summary in the report.

Georgena shared that the in-depth dive included consideration of people with different abilities, for example blind people navigating a map, and consider how to address access.

Cary moved the conversation to the year 2 report topic.

Cary summarized the Council expectations for the report, report contents and the purpose of the working group meetings on the report, noting the importance of carrying the committee's voice through the report materials. She asked the committee to consider if feedback had been integrated and if they agreed with the proposed themes and content and format for the report and to consider

work to highlight for the next year.

Beth shared a slide presentation overview of the year 2 report work, key themes, committee feedback, and looking towards a path to finalize the document in May. This is a comprehensive look at work completed in calendar year 2022, a look for the public and an elevation of the committee's key themes. The committee will report to Council in mid-June. There will be a report, the one-to-two-pagers with program details, an appendix and an executive summary (*refer to slides*).

- Staff will use committee feedback to make the online map a storytelling tool and information tool for multiple audiences to understand bond investments.
- The working groups had expressed that the bond work reporting was solid but needed more context.
- The groups had recommended using case studies to show context and connect work to the bond criteria. The bond criteria snapshot will be tightened. There can be more detailed reporting on COBID participation in future reports.
- Beth reviewed key themes and sought feedback for what would be highlighted in the executive summary and report to Council.
- Beth also shared a list of possible future report topics and foci suggested by the committee and a list of information and data expected to be available to the committee in the coming calendar year.

Beth clarified for Cary that the final report will be accessible on the committee's website and the draft elements are in the committee's virtual resource library.

- Cary requested if possible that the editing and collaboration could take place in a shared document.
- Staff can research feasibility and legality in terms of public meeting requirements. (*Post meeting note: Staff were directed by Office of Metro Attorney to have the committee edit the documents in meetings rather than on a shared document site or via email*)

Burt asked for clarification after reviewing format of past report documents posted on the website, Is the committee still planning to do the two-part summary and the report back in the previous formats.

- Beth clarified the format is up to the committee. The committee voice can be added into the staff materials or a cover piece can be created.

Cary noted it is a report to Council from the committee, but that the time and energy of the Metro staff is appreciated for preparation.

Tabitha requested Council feedback on format preference as there are pros and cons and both could be equally successful.

- Councilor Nolan suggested that there may not be a consensus as the Council members each have different preferences. Mixing narratives, tables, graphs and visuals allow each member to access information in their preferred way, and this is the recommendation for reports to more than one person. Convey what the committee wants to tell the Council in the way you feel most persuasively conveys it.
- Councilor Rosenthal agreed and felt whatever form was most appropriate based on staff and committee feedback will be useful for the Council.

PK reiterated his February meeting point, reminding the committee that concerns about general access are broader than just this report. Consider access for all Metro reports and documents

created for the public. Web-based reports are useful, but downloadable versions should be created for all committee reports and Metro documents as well.

Cary addressed chat comments regarding links to staff reports online. Beth provided links to past reports.

- Cary supported preserving the staff voice in prepared materials and providing committee responses to that and providing a separate response in the committee's voice.

Councilor Simpson agreed with PK about downloadable versions and requested translations into non-English languages to inform communities. He agreed with suggestions so far.

Tabitha felt one integrated report could reduce duplicative feedback or reporting across the working groups. The overlaps in feedback and connections made might be best and most efficiently illustrated in a single report rather than multiple add-ons from each working group.

- Cary agreed on need to prevent duplication of efforts.

MG shared that there are some reporting deadlines and wanted to make sure staff had capacity to support committee desires for the report's final form. Another meeting may be required, or some delegation may be needed within the committee. Staff could also do basic work on the initial document that could then be edited. We want to balance burdens and schedules for staff and the committee with the deadlines.

- Cary acknowledged the constraints and timelines. We can also look forward to plans for the year three report if shifts are needed.

Cary moved discussion to the overview of the local share program and framed some questions and considerations for the committee.

MG shared slides providing a program overview, current progress, and referred to a short video on the program created for the committee to reference. (*refer to slides and video:*

<https://vimeo.com/819282911>)

MG shared more resources for those interested in more details at the program website:

<https://www.oregonmetro.gov/tools-partners/grants-and-resources/local-share>

Cary asked about racial equity, and that there are different levels in partners on this process. Is there training available to create a baseline for participants?

- MG shared that a series of roundtables on engagement best practices were held quarterly for parks providers, and feedback was also taken. Recordings are available at the program website. Staff also provide support as requested.

PK thought local share allowed local communities to influence investments that support equity in a greater sense as they get information from many different communities. He was interested in how impact to the communities played out after rollout of projects and seeing where the money ended up and how it was distributed.

- If the partners have videos of their projects, Metro could share those on the Metro site. Any way to make information accessible would be beneficial to the committee and the public.

Burt shared that the engagement working group was interested in feedback from impacted communities as well as the local share providers regarding that program.

Councilor Rosenthal clarified that while Metro is a parks and nature program, other partners are focused on parks and recreation. Some community feedback to providers prioritizes park use that enables recreation, such as sports fields or courts, that the Metro bond funds cannot support.

- MG shared early provider feedback that showed high support for some recreation development, and Metro clarified that the bond funds require connection to nature and looked for ways to connect the providers to other funding and grant sources to fill those gaps while Metro supported nature development around projects.

Cary moved to discuss next steps and end of meeting business.

Meetings will be scheduled for further report finalization in May and report to Council will be in June.

The next full committee meeting will be in September, and a scheduling and meeting feedback survey will be sent. Members are encouraged to reach out with questions or feedback as well.

Committee will continue to work with staff on planned report to Council and optional in-person gathering at a Metro park or natural area in August.

Cary concluded the meeting.

Meeting chat

00:28:13 Owen Wozniak: Thank you Cary!

00:31:46 Erin Upton (she/her): Welcome to Portland Linda!

01:05:52 Beth (she/her): <https://www.oregonmetro.gov/news/missing-link-steady-evolution-wildlife-corridor>

01:09:34 Owen Wozniak: Sorry, I blabbed too long!

01:25:04 Erin Upton (she/her): Apologies Georgena, I didn't see you had joined the call!

01:41:50 Beth (she/her): if you need them another way, let us know!

01:45:25 Burt Edwards, he/him/his: Could you share the links in the chat Beth?

01:49:02 Beth (she/her): Burt, just clarifying if you are asking us to share the links to the current drafts of the year 2 report materials for editing or just to read/review?

01:49:41 Burt Edwards, he/him/his: No the links of the staff summary and committee report to council from last year. I'm working on two devices otherwise I would

01:51:05 Beth (she/her): <https://www.oregonmetro.gov/sites/default/files/2022/04/20/20220411-year-one-report-back-final.pdf>

01:51:13 Beth (she/her): that's the year 1 report back

01:51:27 Beth (she/her): here's the full staff report for year 1

01:51:43 Beth (she/her): here's the 2-pager

01:51:43 Beth (she/her):
<https://www.oregonmetro.gov/sites/default/files/2022/04/20/20220411-2-pager-formatted-final.pdf>

01:57:29 Georgena Moran - Access Recreation (she/her): Internet is unstable. I'm missing some of the dialogue. Getting the gist, however.

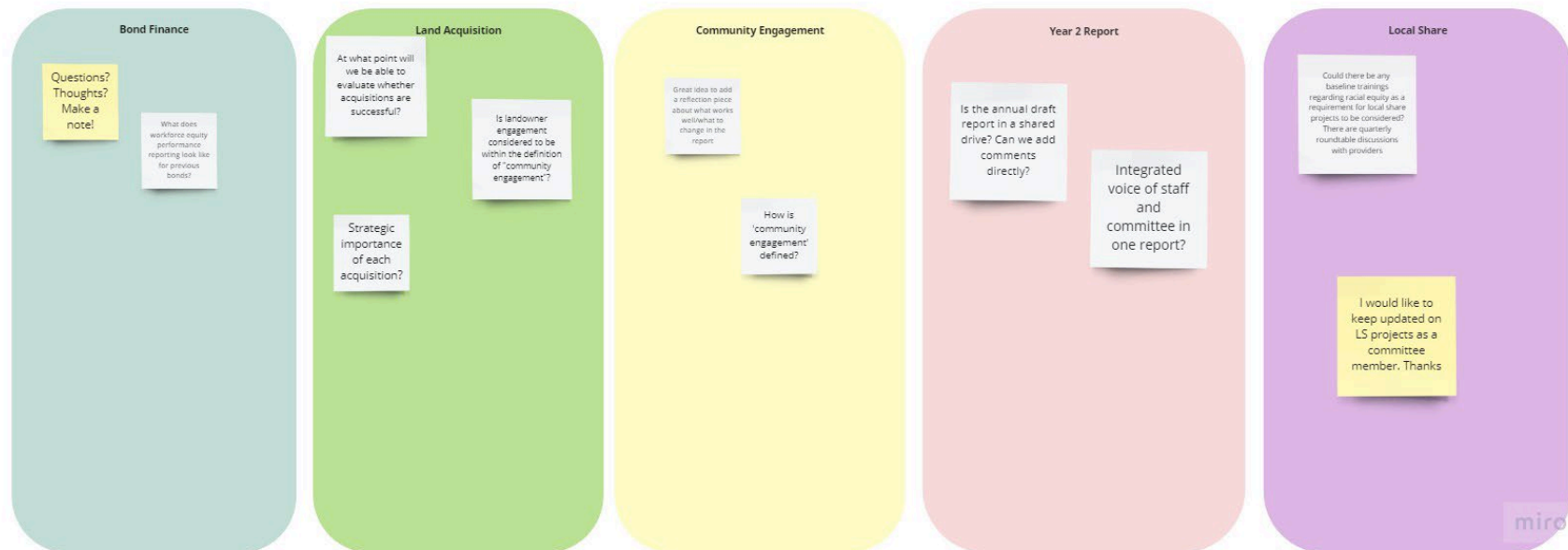
01:58:06 Cary Watters (she/her): Darn, sorry to hear, Georgena! Would it be helpful to connect with you by phone instead?

01:58:20 Cary Watters (she/her): +1 253 215 8782 Webinar ID: 869 8316 6949
Passcode: 655881

02:20:16 Burt Edwards, he/him/his: Thanks Cary!

02:21:39 Erin Upton (she/her): Thanks for leading us Cary! Have a great evening!

Miro board



Bond Finance

Questions?
Thoughts?
Make a
note!

What does
workforce equity
performance
reporting look like
for previous
bonds?

Land Acquisition

At what point will
we be able to
evaluate whether
acquisitions are
successful?

Strategic
importance
of each
acquisition?

Is landowner
engagement
considered to be
within the definition
of "community
engagement"?

Community Engagement

Great idea to add
a reflection piece
about what works
well/what to
change in the
report

How is
'community
engagement'
defined?

Year 2 Report

Is the annual draft
report in a shared
drive? Can we add
comments
directly?

Integrated
voice of staff
and
committee in
one report?

Local Share

Could there be any
baseline trainings
regarding racial equity as a
requirement for local share
projects to be considered?
There are quarterly
roundtable discussions
with providers

I would like to
keep updated on
LS projects as a
committee
member. Thanks

Natural areas oversight committee land acquisition working group

Attendees: Vivek Shandas, Owen Wozniak, John Ferguson, Dan Moeller, Shannon Leary, Jonathan Soll, Melanie Reinert, Beth Cohen

Review of year 2 report materials

Protect and restore land snapshot

- Overall facts and figures looks good
- How to add more meaning and context around the numbers and data share. What does it mean?
- For example, what context can be added to demonstrate progress on acquisitions to date? How many are high priority targets?
- Add information about goals and actuals around landowner outreach and a snapshot of whether acquisition program fully up and running (i.e. is there a full staff team?)
- How do we measure progress over time with the low hanging fruit gone and market conditions being challenging? Progress on this bond will look different than the 2006 one
- This should be a snapshot of whether we are trending in the right direction... This is the nature of the work and the progress in 2022/2023 and these are the ways it's meeting expectations and the ways its not
- This bond measure does make the process of protecting land different...how that's playing out on the ground. Finding the right places to protect, getting the deals together and bringing them home.

Draft map of bond investments

- Opportunity to show the land purchases from each bond measure so we can see how they're coming together
- Add overlay about previous purchases and how they may connect to recent acquisitions
- Think about opportunity to zoom into sub-regions
- What kind of story-telling can the map provide on land acquisition? Why were these properties identified...how do they collectively should impact visually?
- GIS of Metro maps...accessibility to all natural areas
- One stop public facing, story telling impact measurement.
- Maybe we should be building a running story map in which each acquisition gets a 1-2 page story showing how they met bond criteria and telling the story a little
- Opportunities for sidebar that shows more detail

Questions/topics for future exploration

Climate resilience

- What additional context can be provided about how climate resilience is showing up for this bond measure versus the previous one? For example, analyzing acquisitions of headwaters in the previous measure and seeing how did those particular attributes that are identified here align with what were purchased in the previous one?
 - Response: In a few years, when we have 20 or 30 acquisitions under our belt, we'll have more robust data to analyze. Right now there's not enough data to really analyze in this way.

- We could share the data that we analyze about each property to make those determinations around meeting climate resilience criteria or factors (like connectivity, anchor habitat, water quantity and quality (not actually bond criteria))

Future feedback on mapping

- Working group review map in more detail and begin to provide a list of potential items we could explore incorporating this year and beyond. List a few pieces of information as a starting point.
- Working group think about information that is pertinent for the committee and information that's pertinent for the public

Proposed next steps for year 2 report

- At April 25 full committee meeting, working groups will be asked to share out from discussions with focus on discussions about staff report, Committee coalesces around draft report with future working group review
- By early May 2023: staff has revised report materials in line with feedback at working groups and full committee; including draft 1-2 page summary of the report back to Council based on committee discussion to date
- Mid-May 2023: set of working group meetings to review final materials (could potentially offer an optional drop in session to walk through and get final ok)
- Mid-June 2023: co-chairs present to Metro Council

Natural Areas Oversight committee finance working group, April 10, 2023

Attendees: Shannon Shoul, Cary Watters, Tabitha Palmer DuPrau, MG Devereux, Melanie Reinert, Beth Cohen

Feedback on draft year 2 report materials

- *Overall comment*
 - Turn passive voice into active voice
 - Do we have to report same things as previous year with same format?
 - Answer, the committee can direct what is reported to show how the bond is meeting requirements and goals and it can change year to year. Guidance on where table form and detail form, visual representation is welcome.
- *Land acquisition snapshot*
 - Need more context on dollars spent and perhaps a list of properties acquired.
 - Add how many acres purchased through 500 transactions
 - How to describe for land acquisitions cumulative and for each one the strategic assets with major impacts. Go beyond acres but show acres with additional benefits.
 - Is there a way to identify the strategic importance of each land acquisition? (either by climate resilience criteria, habitat or tier 1/tier2)
 - Show progress by target area
- *Bond finance report*
 - A couple of minor recommendations for the report: 1) change "COBID spending" header title to "Contract Equity", and 2) consider using the term "participation" instead of "utilization".
 - Is there an opportunity to pull out multiple certification types, with only the top one in the hierarchy reflected in the pie chart.
 - Clarify money spent vs. money awarded through executed Intergovernmental agreements We're awarded this amount of funds. Money committed in the future, have other people to spend it.
 - Explore similar approach to funds awarded vs. spent for COBID contracts
- *Ideas for mapping*
 - If we have the spend and that mapping in a visual and user friendly and what are the overlays that allow access.
 - Think about how to include in the map target areas and shading showing each year's expansion. Highlight purposes, benefits to areas. Get away from graphs and look more at maps, target areas, property acquired and coloring.
 - Map (with diff. shading to show progress over time)

Recommendations for future reporting

- Disaggregate on COBID reporting. Use city of Portland as a model. Fields for race and gender.

- Think about using map to analyze for community access (i.e. distance to parks, is it a 10 minute walk?) Equitability and accessibility overlays and percentages of demographics could be useful in future reports, show impacts in region.
- How equitable across target area for land acquisition efforts look like?

Questions

- Do we report that we're not commingling funds from different bond measures?
 - a. Answer is we have an independent financial audit conducted each year that affirms that is not happening
- What tool does Metro use to track COBID?
- Describe how personnel costs are described in fund table. Why are there two rows for personnel costs?

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Community engagement working group April 2023 meeting

Attendees: Burt Edwards, Georgena Moran, Erin Upton, Humberto Marquez Mendez, MG Devereux, Melanie Reinert, Beth Cohen

Takeaways from last meeting/updates

- Appreciative of Olena and the way she presented on the engagement work for Blue Lake Park
- ORPA doing a conference in November in Portland and wanted to give people a heads up about that.

Discussion on year 2 report

Review of bond criteria summary document

- Content of criteria section
 - Things to think about adding to each section—top line takeaways on each section, on topics where there are working groups (land acquisition, community engagement finance), think about having each working group write a brief introduction to the section.
 - Do an overall snapshot from the beginning
 - Put more detailed tables and resource list at the end of the report in the appendix
 - Helpful to have criteria summary include a case study snapshot on engagement, like the case study on community choice grants. Good reminder of the types of organizations Parks and Nature works with on multiple bond projects.
 - Be more explicitly about addressing what the staff feels as what meaningful engagement has been
 - Provide a clearer and more explicit list of the bond criteria
 - Any piece of reflection from the staff about what was surprising and what was tried and didn't work.
- Format of criteria section
 - Update formatting of the community engagement flow chart
 - Present community engagement criteria in a box (call out box)
 - Is there some way to number the criteria and reference them with the same number. Color band
 - Proposed changes in format, presentation. For equity and criteria, consider a call-out box. Additional layers of explanation and avoiding jargon will be helpful.
 - Number or color code bond criteria for ease of references

Recommendations to increase accessibility of report, map and materials

- Think about minimizing text to make it more manageable for reader app
- hyperlinks within the document to other sections to choose areas they are interested in.
- Look at colors of map and aim for 70 percent color contrast
- Add hyperlinks to different sections of the report so people can hand choose which they are
- Tab to map that shows list of projects in addition to dots on the map
- Font could be bigger and bolder
- Dots on the map could be more contrasting

Review of draft map of bond investments/potential uses of future mapping capability

- Think about doing sub-regional maps when there are more bond investments (i.e. dots)
- Long term, show investments in bond funds and levy and spread across the region and show concentration of investments in urban core as well as outside
- Explore opportunities for map to show how investments connect and systems. It's not just one park, but a system of parks. Not just one land acquisition but a system to build resilience
- Connect to investments from other park providers
- Explore how to build a layer for climate resilience
- Potential for overlays with other social and ecological data. For example, mapping layers of communities of color
- Access and engagement work...continual nudge to drill down on these topics

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Metro

Natural Areas and Capital Program Performance Oversight Committee

April 25, 2023

Today's agenda



- | | |
|-----------|---|
| 4:00 p.m. | Welcome and introductions |
| 4:05 p.m. | Committee business reminders |
| 4:10 p.m. | Working group report backs (<i>discussion item</i>) |
| 4:40 p.m. | Refining year 2 report (<i>discussion item</i>) |
| 5:10 p.m. | Parks and Nature bond's local share program (<i>informational item</i>) |
| 6:00 p.m. | Adjourn |

Reminder: Meeting topics and activities for 2023



GOAL 1:
Deepen
understanding
of bond

GOAL 1:
Deepen
understanding
of Metro

GOAL 2:
Continue
evaluation
of bond

GOAL 3:
Strengthen
committee
membership
and leadership

Dec. 2022	Feb. 2023	April 2023	Sept. 2023	Dec. 2023
Climate resilience/protect and restore land  	Take care of Metro parks 	Local share 	Large scale community visions  	Capital grants  
	Connect with Council liaisons	Site visit/tour opportunity	Site visit/tour opportunity	Connect with other Metro committees
	Develop process for year 2  	Review staff report for year 2 	Any debrief from year 2 report 	
Plan for targeted recruitment in 2023	Co-chair identified; working group time	Working group time	Working group time	3

Committee business reminders



Public testimony received

Reminders to reply only to
parksandnaturebond@oregonmetro.gov
on committee business

Other member updates to share?

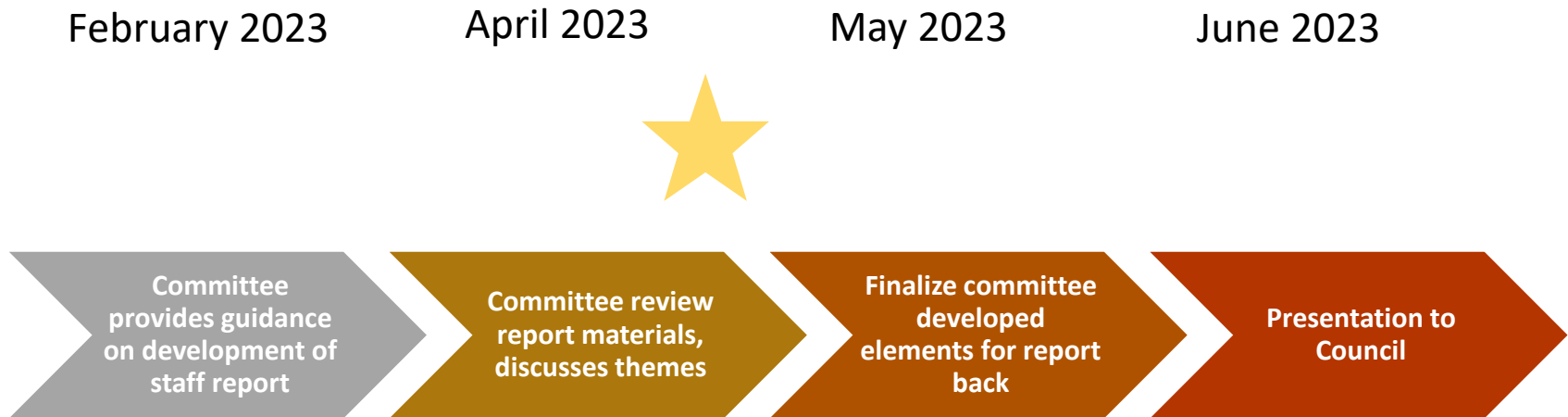
Discussion on year 2 report



Metro



Process for year 2 report development



Goals for discussion on year 2 report



Ensure the year 2 report meets the committee's goals so staff can continue to finalize report in May 2023 by

- Reviewing/affirming key themes to highlight from working group discussions
- Ensuring the committee's voice and perspective and feedback is reflected in the year 2 report materials

Questions for committee discussion



1. Does the content of the draft year 2 report meet committee's expectations or goals? Have staff accurately captured feedback on year 2 report to date? (see slides 9-14)
2. Does the committee agree with or have adjustments to the key themes in the report? Are there other issues or themes that should be included? (see slide 15)
3. Are there focus items for future work the committee wants to highlight? (see slides 13-17)
4. How would the committee like to finalize this report in May?

Reminder | Potential goals for committee year 2 report back



Content:

- Snapshot of progress made on bond investments and bond criteria in calendar year 2022 on bond criteria
- Identify questions or recommendations for Council consideration
- Highlight key themes and focal areas for committee moving ahead
- Circle back to issues/questions/comments raised in the year 1 report and show progress or highlight

Formatting: make the final report as easy to access and readable as possible; format can change year to year

Elements of staff report for 2022



Summary of committee discussions in 2022 by topic area

Program specific snapshots of milestones complete in 2022

Snapshot of progress on bond criteria

Bond finance report (captures information as of spring 2023 as Metro's fiscal year runs from July-June)

Committee feedback to shape year 2 report | format for materials



Use infographics and visuals and maps, balance visuals with narrative

Ensure visuals have context, description and meaning and can point to collective impact or progress over time

Incorporating executive summaries and 2-pagers where possible

Opportunity to refine draft map of bond investments to show additional context such as connectivity to other land purchases and progress on acquisition and trails over time

Evaluate all materials to maximize accessibility for readers

Opportunity to have brief summary from each working group with topline findings for land acquisition, finance and engagement

Move detailed tables to the appendix

Draft map of bond investments



Parks and Nature - 2019 Bond Measure project update



All projects

Protect and Restore

Regional Trails

Local share

TCMP

Community Grants

Community Vision

Overview of the Parks and Nature Bond Measure

Trail Program:

of projects

\$ dollars invested *

Protect and Restore Program:

of projects

\$ dollars invested *

Local Share Program:

of projects

\$ dollars invested *

Taking Care of Metro Parks :

of projects

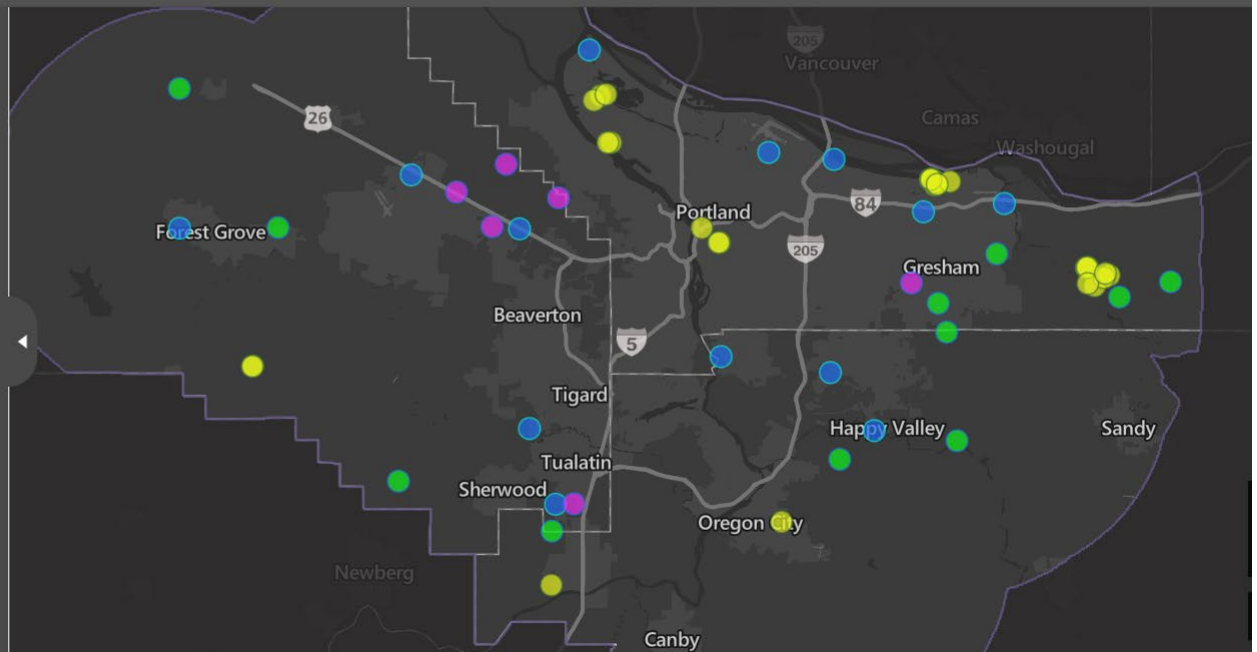
\$ dollars invested *

Community Grants :

of Community Choice Grants Pilot projects

\$ dollars invested *

of Capital Grants projects



Metro Data Resource Center drc@oregonmetro.gov | Parks and nature

Powered

Committee feedback to shape year 2 report | Building context for information shared



For land acquisition

- Include more context in maps for specific program areas (i.e. add target areas and previous acquisitions)
- Provide more context about strategic importance of each acquisition made; not just facts and figures
- Provide more context about logistics overall acquisition process, opportunities and challenges

For bond finance

- More context about spending trends year to year by program
- Report on both money spent and awarded and explore doing the same for COBID contracts

For engagement

- Case study is helpful
- Distill into top line findings on engagement; add reflection from staff if possible

Committee feedback to shape year 2 report | Assessing progress on bond criteria



More clearly articulate bond criteria in the document

Provide more descriptive information about community engagement activities to date beyond how many people have been engaged

Take progress on criteria as a whole across the bond, not just program by program

Explore strategies to disaggregate hierarchy of types for COBID reporting, capture race and gender information

Opportunities to evaluate for accessibility

Better articulate strategic importance of acquisitions for factors of water quality/quantity, connectivity and anchor habitat

Key themes from bond work accomplished in 2022



Bond refinement is complete; all six bond programs are launched and making investments in the region. Bond investments are ramping up and bond spend is increasing. Bond programs anticipate even more activity, investment and spend in 2023 and beyond.

In 2022, the Natural Areas Oversight Committee has reviewed in detail several of the bond programs, case studies that illuminate the bond criteria in action and has helped shape frameworks for reporting and evaluating progress.

Staff are continuing to utilize and employ innovative community engagement approaches to bond projects and to support park providers in doing the same

The Natural Areas Oversight committee and Metro staff made progress in calendar year 2022 on developing tools to report and measure bond progress on the bond criteria. Understanding and determining the full impact of bond investments on advancing the bond criteria over the life of the bond will require more time, more bond investments to analyze.

In the coming year and beyond, staff will be able to provide to the committee more information, reporting and tools through which the committee can determine progress towards bond spend and bond program goals.

Oversight Committee has reviewed the following bond programs



Bond program	Deep dive with committee? y/n	when
Local share	Y	At April 2023 meeting
Protect and restore land	Y	In working group and at December 2022 meeting
Community choice grants	Y	In community engagement working group
Take care of Metro Parks	Y	At February 2023 meeting
Walking and biking trails	N	
Large scale community visions	N	

Oversight Committee has reviewed many elements of bond criteria



Topic related to bond criteria	Deep dive with committee? y/n	When/how?
Bond evaluation outcomes project	Y	May and September 2022 committee meetings
Bond's climate resilience criteria	Y	December 2022 committee meeting
Meaningful community engagement case studies	Y	February 2023 meeting; February 2023 engagement working group
Overview of COBID participation	Y	Finance working group
Advancing accessibility at Metro sites	Y	May 2022 engagement working group
Workforce participation in bond funded projects	N	

Potential topics to continue exploring in next year (illustrative, not comprehensive)



Explore potential of mapping as a tool for analysis to better understand bond investments as connected systems, progress over time and on criteria like access, climate and racial equity

Information on Metro's tribal government engagement related to Parks and Nature bond

Opportunities to measure dimensions of access around bond funded projects

Analyze acquisitions from 2006 bond to understand how 2019 acquisitions are comparing especially on climate

Continue to review updates and evaluation on engagement process and projects

In the coming year, more information available for committee to assess progress



More specifics on anticipated pace of funds spent and awarded by program

Ability to refine and expand on mapping tools/spatial analysis

Increase in number and type of project awards to demonstrate breadth of bond investments

- Capital grants
- Large scale community visions
- Community choice grants
- More local share projects identified

Impact of bond investments

- Evaluation outcomes report
- Evaluation of engagement efforts at Blue Lake Park renovation and community choice grants
- Reporting from park providers on engagement and other efforts for local share, trails projects
- Exploring whether Metro can conduct more nuanced analysis of COBID reporting looking and race and gender categories more specifically

Potential next steps



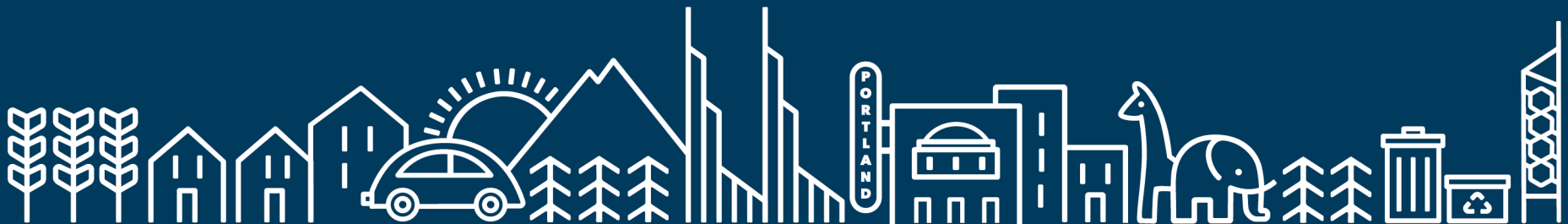
April 2023: Committee coalesces around draft report with future working group review

By early May 2023: staff has revised report materials in line with feedback at working groups and full committee; including draft 1-2 page summary of the report back to Council based on committee discussion to date

Mid-May 2023: set of working group meetings to review final materials (could potentially offer an optional drop in session to walk through and get final ok)

Mid-June 2023: co-chairs present to Metro Council

oregonmetro.gov



PN bond program deep dive: Local share



Metro



Today's agenda



- | | |
|-----------|---|
| 4:00 p.m. | Welcome and introductions |
| 4:05 p.m. | Committee business reminders |
| 4:10 p.m. | Working group report backs (<i>discussion item</i>) |
| 4:40 p.m. | Refining year 2 report (<i>discussion item</i>) |
| 5:10 p.m. | Parks and nature bond's local share program (<i>informational item</i>) |
| 6:00 p.m. | Adjourn |

Goals for today's discussion



Highlight for committee impact from local share program in bringing nature to communities across the region and advancing bond criteria

Review with committee opportunities and challenges with program implementation to date

Questions for discussion



Does the committee want regular updates on local share projects awards and progress?

Feedback on approach to local share reporting in that it will align with Metro's bond reporting

Whether it would it be valuable to have presentations or site visits from local share partners

Local share background



Metro

Allocation to 27 park providers across the region

Projects must address bond criteria

Many park providers submitting projects and determine their own timeline for submittal



Local share funds support nature projects across the region



Local share program at-a-glance



Money allocated in bond: \$92 million to 27 park providers for natural area and park land acquisitions, habitat restoration, new or improved access facilities at public parks and natural areas, local or regional trails, enhanced or new environmental educational facilities.

Key documents

- [Local share handbook](#)
- Council approved local share IGA template (approved by resolution)
- [Local share webpage with resources for identifying and submitting projects](#)

Key issues for awareness

- Allocations based on a population, assessed value formula, range from \$200,000 to over \$30 million.
- Park providers have ten years to identify and submit projects for funding.
- Program is largely reimbursement based with the allowance up to 30 percent awarded up front. For acquisitions, full dollar amount is awarded up front.

Progress to date



\$9.3 million awarded to 3 park providers for 5 projects; \$4 spent on land acquisition

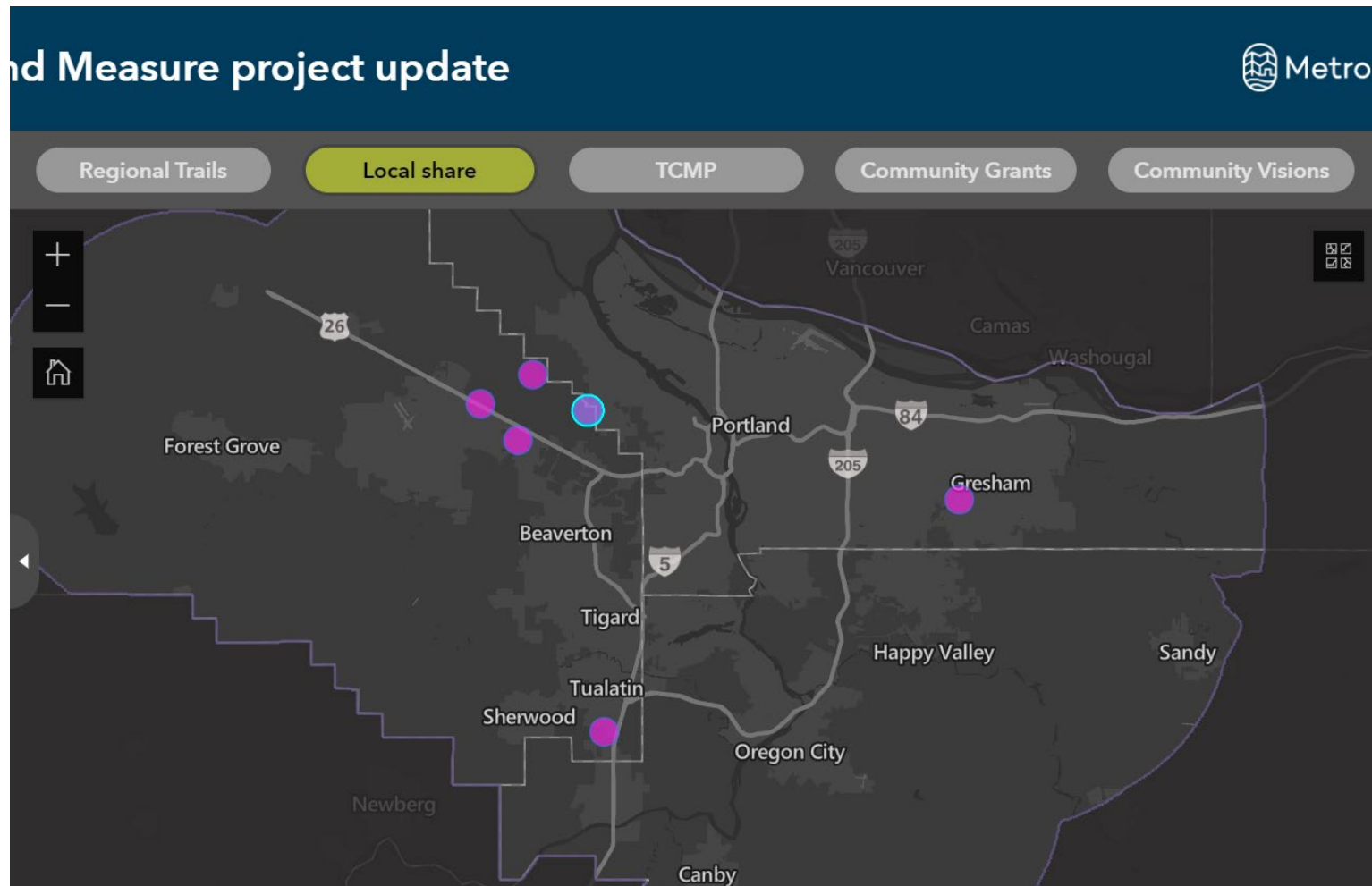
- [\\$2.5M to Gresham for acquisition near SW Community park](#)
- [\\$5.3M to THPRD for 3 projects](#) (Willow Creek Greenway Boardwalk in Beaverton, Heckman Lane Park and Trail in the North Bethany neighborhood, and two accessible play structures in Bonny Slope and Rock Creek)
- \$1.5M to Tualatin for acquisition near Basalt Creek

7 projects in review (5 from Portland Parks and Recreation, Forest Grove and Wilsonville)

Other park providers are planning to submit projects.

Multiple meetings and 8 roundtables to support park providers in meeting bond criteria

Projects awarded funds

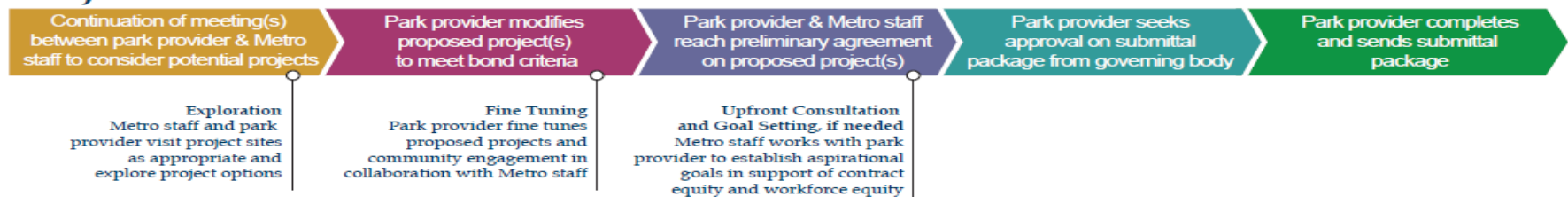


Local share submittal process

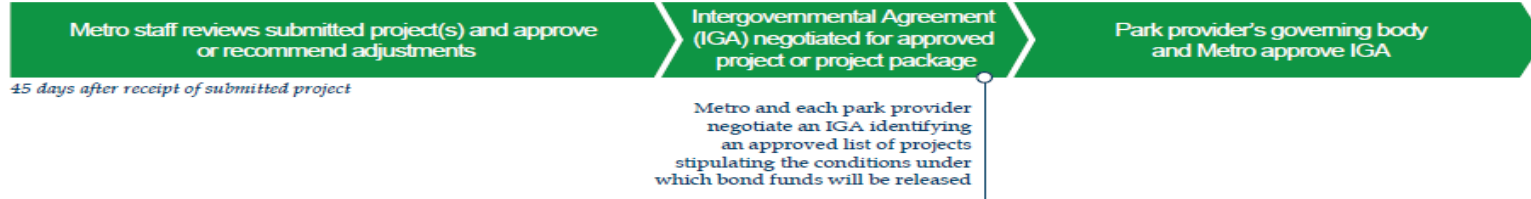


Local Share Project Proposal and Approval

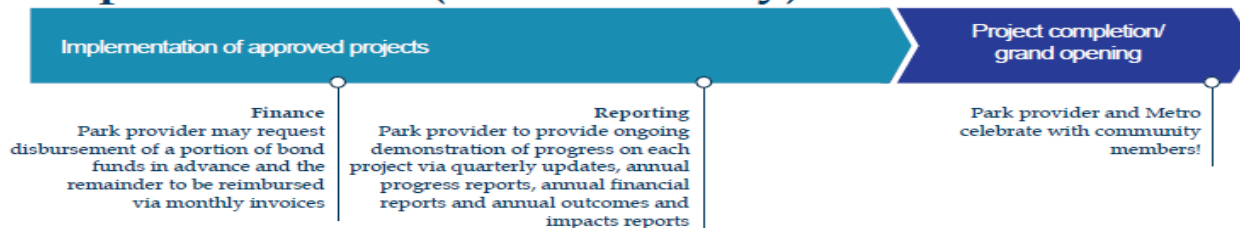
Project Submittal These are broad steps. The process will look a little different based on the needs/readiness of each park provider



Project Approval



Implementation (timelines vary)



Contributing to bond impact



Local share projects located in underserved communities across the region

Local share projects advancing accessibility

Opportunity to build capacity in park providers on community engagement, racial equity and climate resilience

Challenges



Pace of project submittal slower than expected

Pace of project identified and submittal is determined by park providers, not Metro

Working with park providers of all different sizes working to right-size bond criteria

Evaluation

As a reimbursement based program, local share spending will lag project approval

Demonstrating progress over time

Map of local
share projects
awarded
funds

Interviews with park
providers

Number and type of
local share projects
awarded

Demonstrate
progress on
local share
program over
time

Regular surveys of
park providers

Questions for discussion



Does the committee want regular updates on local share projects awards and progress?

Feedback on approach to local share reporting in that it will align with Metro's bond reporting

Would it be valuable to have presentations or site visits from local share partners?

Informational item: Spring 2023 bond updates



Metro



January-March 2023 bond updates



- Recent land acquisitions included purchase of a 92-acre property in Abernethy and Newell Creeks Target Area and acquisition of a 5 parcel in the East Buttes target area via donation which makes 13 purchases, totaling 484 acres across 10 target areas.
- 7 projects submitted and in review for local share (5 from Portland Parks and Recreation, 1 from Forest Grove, 1 from Wilsonville)
- 3 applications submitted in early April for large scale community visions pilot round
- Solicitation for initial round of Nature in Neighborhoods resulted in 16 letters of intent; 10 invited to submit full applications by end of April
- Launch of capital grants pilot idea generating phase in Metro Council district 4, Western Washington County

Bond milestones upcoming in April/May



Launch of community choice grants idea generating phase in Metro Council district 4, Western Washington County via community events and [online portal](#)

Metro Council determination on project selection for the large scale community visions pilot round

Land acquisitions (ongoing)

Local share project review (ongoing)

Community engagement snapshot | Community Choice Grants



In anticipation of March 2023 information sessions and April 2023 idea generating events to get people interested in the process and ready to submit project ideas, staff targeted the following organizations in western Washington county with a focus the Elmonica and Aloha communities to attend and share with their networks.

- Schools and youth focused organizations (*Merlo Station High School, Meadow Park Middle School, Beaver Acres Elementary School, Chinmaya Mission, Rock Creek Community Association, Westview High School, Raymond Arthur Brown Middle School, McKinley Elementary, 4 Youth, Beaverton High School, Multilingual Department, Beaverton School District, APANO, International School of Beaverton (barely outside of District 4, Quatama Elementary School, Orenco Elementary School, Family Justice Center of Wa. Co, Hillsboro High School, Poynter Middle School, Lincoln Street Elementary School, Eastwood Elementary School, Neil Armstrong Middle School, Cornelius Elementary School, Forest Grove Community School, Forest Grove High School, BSD Black Parent Union)*)
- Organizations focused on the disability community (*People with Disabilities, CACA*)
- Cultural organizations (*Ka'Aha Lahui O 'Olekona Hawaiian Civic Club of Oregon, Asian Health and Services Center, Center for African Immigrants, Latino Network, Centro Cultural, Adelante Mujeres, Muslim Education Trust, Bilal Masjid, Southwest Somali Community, Wisdom of the Elders*)
- Community services organizations (*Homeplate, Beaverton Resource Center, School, Lifeworks NW, Community Action Family Shelter, Bienestar, Vision Action Network, Unite Oregon, Virginia Garcia Wellness Center*)
- Conservation organizations (*Tualatin River Watershed Council*)
- Advocacy organizations/alliances (*National Alliance on Mental Illness (NAMI)*)

Staff also shared information about the April idea generating events through Metro's social media and through press releases in local papers

Results

- 25 attendees of two virtual information sessions
- 50 attendees at first in person idea collecting event in April

Bond finance reporting



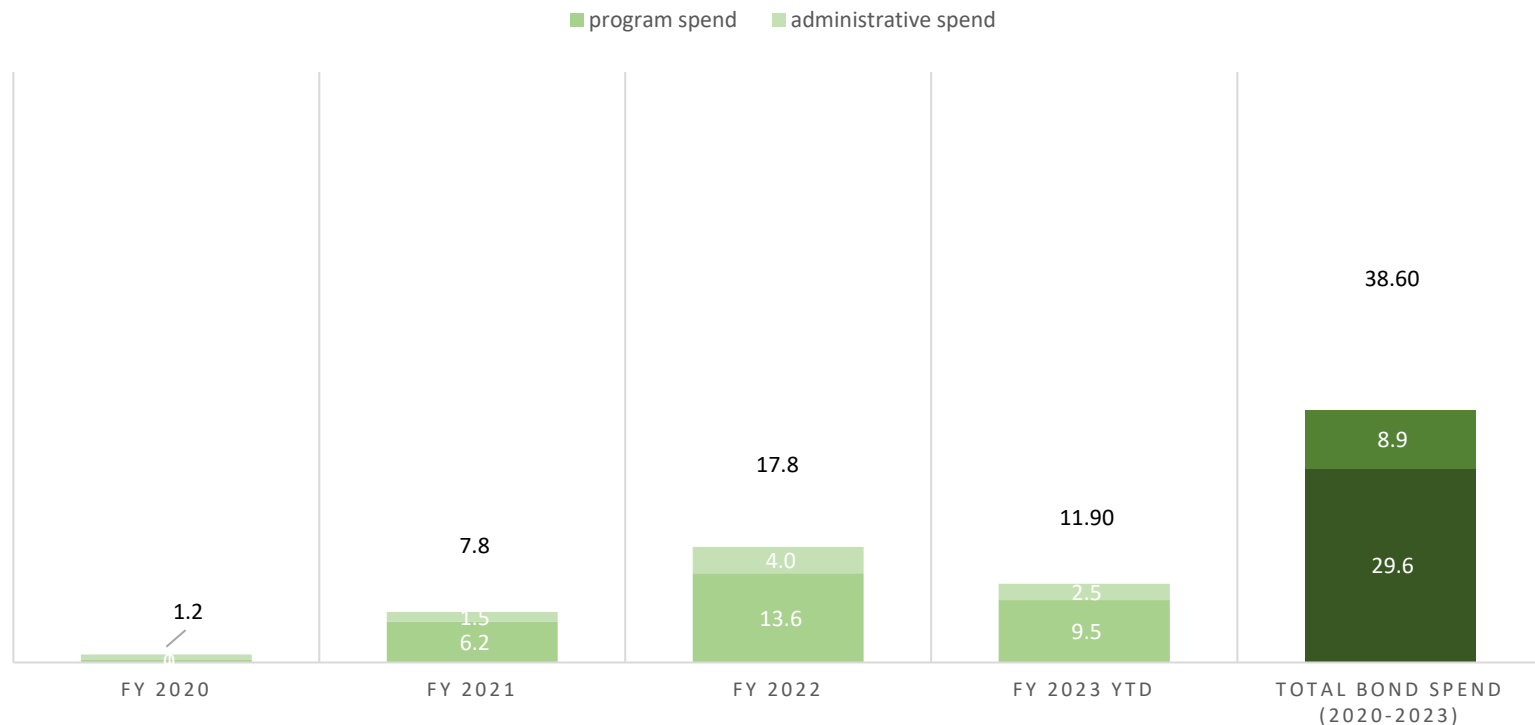
Metro



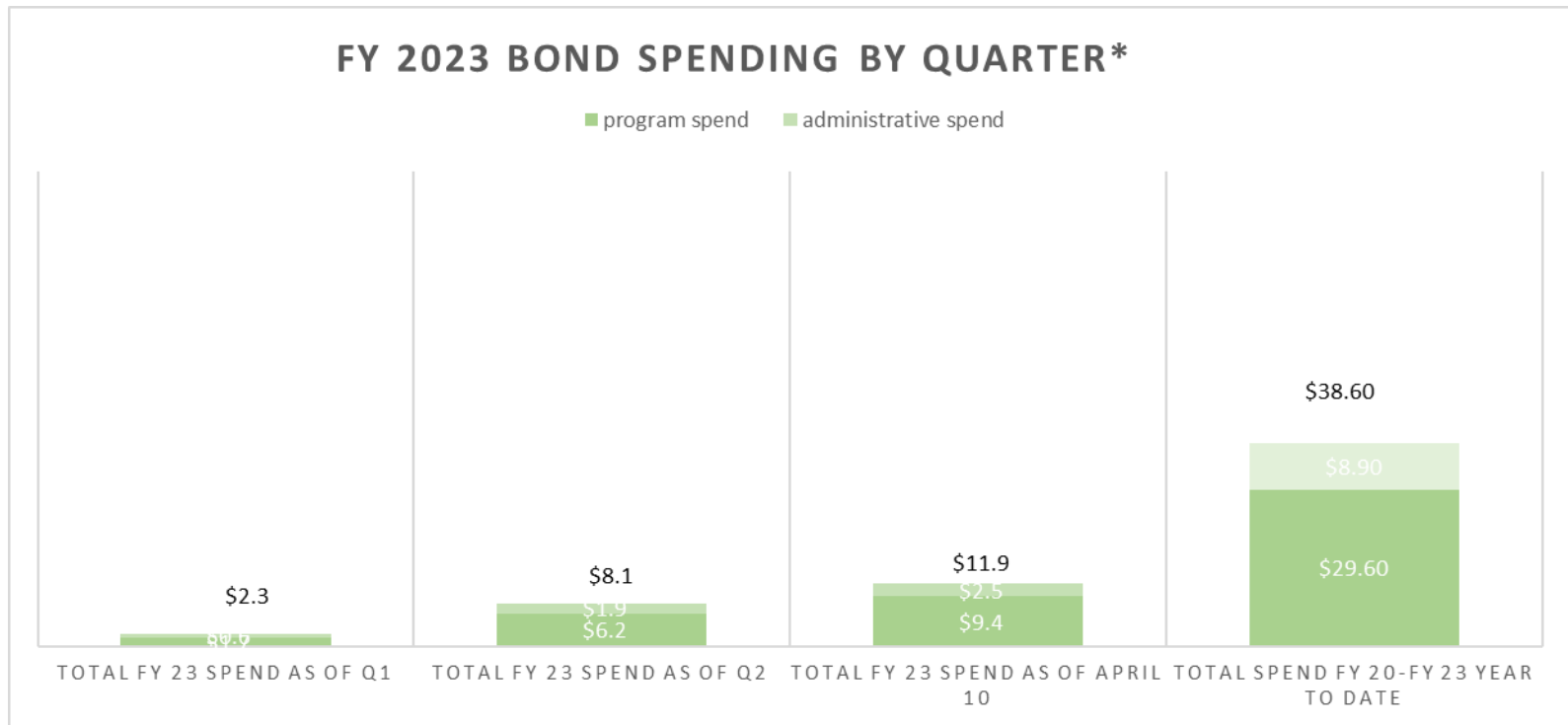
Total bond funds spent as of April 2023



BOND SPENDING BY FISCAL YEAR (IN MILLIONS)



FY 2023 bond spending by quarter, as of April 2023



Numbers in millions

COBID spending over the life of the bond as of March 2023



Information to come

Reference slides



Metro



Committee members



Tana Atchley Culbertson
Burt Edwards
Lisa Freedman
Bryan Mercier
Georgena Moran
Cary Watters
Owen Wozniak
John Ferguson
Shantae Johnson
Michelle Lin
Martita Meier
PK Melethil
Tabitha Palmer DuPrau
Vivek Shandas
Shannon Shoul
Erin Upton

Co-Director, Nesika Wilamut
Director of Programs, Re-Think Media
Former US Forest Service Executive and Budgeting Director
NW Regional Director, Bureau of Indian Affairs
Accessibility specialist, ACCESS recreation
Contract equity manager, Portland Bureau of Transportation
Land Transactions Program Manager, the Land Trust Alliance
Former geotechnical engineer
Owner, Mudbone Grown LLC
Strategist, Oregon Food Bank
Digital Strategist and Project manager
Environmental Scientist, TCM physician
Underwriting Counsel, Fidelity National Title Group
Professor, Portland State University
Director, Procurement Sustainability, Nike
Environmental social scientist and landscape architect

Council liaisons



Metro

Councilor Ashton Simpson, District 1: includes Fairview, Gresham, Troutdale, Wood Village, portions of East Portland and the unincorporated communities of Damascus and Boring

Councilor Mary Nolan, District 5: includes Northwest and North Portland, portions of Southwest and Northeast Portland, plus the city of Maywood Park and part of Washington County.

Councilor Gerritt Rosenthal, District 3: includes portions of Washington and Clackamas counties and the cities of Beaverton, Durham, King City, Sherwood, Tigard, Tualatin and Wilsonville

Staff team



Parks and Nature leadership: Jon Blasher, MG Devereux, Dan Moeller, Mychal Tetteh

Background information, staff support: Beth Cohen

Meeting logistics, administrative support: Melanie Reinert

Office of Metro Attorney: Michelle Bellia

Parks and Nature finance manager: Chantia Clark

Group agreements



- In discussions, challenge ideas rather than individuals.
- Approach different opinions with curiosity, seek to understand.
- Keep the needs and concerns of the local community and the larger region at the forefront of the work.
- Keep focus on the objectives of the meetings; work with facilitator to note additional topics for discussion.
- Keep multi-tasking to a minimum

Group agreements



- Notify committee chairperson and Metro staff of any media inquiries and refer requests for official statements or viewpoints to Metro. Committee members will not speak to media on behalf of the committee or Metro, but rather only on their own behalf.
- Share questions they have with the full committee so everyone can benefit from the answers
- **Members in working groups commit to capturing discussions to transparently share the results with the larger group.**

Land acquisition at-a-glance



Money allocated in bond

Total of \$155 to acquire priority parcels in 24 target areas across the region through a willing seller program (\$15 million for community-led acquisition), plus \$10 million from trails program for trail gap acquisition

Governing documents

- Council approved refinement plans with acquisition priorities for land and trail gaps
- Natural areas work plan sets parameters for acquisition protocol
- Closing memo for each completed purchase to Metro Council and oversight committee demonstrates alignment with bond criteria

Progress to date (as of February 2023)

- Deep engagement to identify priorities for land acquisition
- \$12 million spent on 12 acquisitions
- Acquisition of over 478 and 1 trail gap
- Hired two real estate specialists
- Outreach to about 80 landowners since July 2022

Trail grants program at-a-glance



Metro

Money allocated in bond: \$20 million for grants to trail planning and construction projects

Key documents

- Council approved resolution approving slate of grants
- Trail grants handbook
- Report from summer 2022 public comment

Progress to date (as of February 2023)

- one cycle of trail grants awarded to 12 projects for \$19.5 million in September 2022;
- moving towards executing IGAs for the 12 projects awarded

Key issues for awareness

- Grant program is reimbursement based, with up to 30% available up front
- Incorporating policy priorities into requirements for grantees like cultural resource assessments for ground disturbing activities and workforce equity goals

Local share program at-a-glance



Money allocated in bond: \$92 million to 27 park providers for natural area and park land acquisitions, habitat restoration, new or improved access facilities at public parks and natural areas, local or regional trails, enhanced or new environmental educational facilities.

Key documents

- [Local share handbook](#)
- Council approved local share IGA template (approved by resolution)
- [Local share webpage with resources for identifying and submitting projects](#)

Progress to date (as of February 2023)

- five projects awarded \$9.3 million in funds; \$4 spent on acquisition
- 5 projects in review (3 from Portland Park and Recreation, Forest Grove and Wilsonville);
- 1/1 meetings and 8 roundtables to support park providers in meeting bond criteria

Key issues for awareness

- Allocations based on a population, assessed value formula, range from \$200,000 to over \$30 million
- Park providers have ten years to identify and submit projects for funding;
- Program is largely reimbursement based with the allowance up to 30 percent awarded up front. For acquisitions, full dollar amount is awarded up front.

Nature in Neighborhoods Capital grants program at-a-glance



Money allocated in bond: \$4 that the community in western Washington County will identify a project or projects for funding using participatory budgeting principles

Key documents

- Pilot guidebook and guidebook brief
- RFP for community engagement services for idea collection and community vote phases

Progress to date (as of February 2023):

- Preparing materials to launch idea collection activities in Spring 2023
- Convened a committee in 2021 to build the program handbook and guide idea collection;
- affirmed initial geographic focus for pilot on district 4;
- Partnering with 5 park providers in district 4 on pilot;
- hired community engagement team for idea collection and preparing materials and website for future engagement and community voting

Key issues for awareness:

- Project(s) selected will need to be in public ownership

Nature in Neighborhoods Capital grants program at-a-glance



Money allocated in bond: \$40 million for projects that support partnerships between park providers, community organizations, schools and others to increase experience of nature at the community scale

Key documents: [Capital grants initial solicitation handbook](#)

Progress to date (as of February 2023):

- Developed solicitation for initial round with an eye towards recommending a slate of funding awards to Council in summer 2023
- Received 16 letters of intent for \$6 million

Key issues for awareness:

- This program in the 2006 natural areas bond funded 8 rounds of grants including projects like Cully Park, Gateway Green, Nadaka nature park in Gresham, Milwaukie riverfront park
- Projects must involve partnership of a park provider and community organizations and funded projects must result in a capital asset in public ownership
- Traditionally it has taken time, staff support and building relationships with grant recipients to identify projects that will result in a capital asset and are ready for funding

Take care of Metro parks program at-a-glance



Money allocated in bond: \$98 million to take care of Metro's developed sites across the region with a focus on addressing infrastructure at sites like Blue Lake and Oxbow before investing in new development at sites with approved master plans.

Key documents

- PN Capital Improvement Plan

Progress to date (as of February 2023)

- \$9 million spent to complete 9 projects
- Completed Chehalem Ridge and Newell Creek
- Completed Blue Lake Park utilities and facilities plan, water line phase 1, building demo and projects underway at BLP including water line phase 2, sanitary sewer
- Kick off of ADA improvements to Oxbow boat launch parking
- ADA pilot at Graham Oaks
- Engagement activities at Lone Fir Cultural Heritage and Healing Garden

Key issues for awareness

- Blue Lake Park Curry building project incorporates Metro's regional workforce agreement goals.
- About \$10 for investing in ADA transition plan including pilot at Graham Oaks
- \$4 million to Lone Fir Cultural Heritage and Healing Garden

Community visions program at-a-glance



Metro



Money allocated in bond: \$50 million to help deliver significant investment in habitat preservation, restoration, and access to nature in coordinated and visionary capital projects, \$20 million earmarked for Willamette falls legacy project

Key documents

- Council approved pilot program handbook
- Website with active notice of funding availability

Progress to date (as of February 2023):

- Pilot solicitation for up to \$10 million in projects open in summer 2022
- 4 letters of interest submitted by end of October 2022
- Completed initial review of letters of intent

Bond administration/criteria alignment at-a-glance



Key documents

- [Bond measure language](#)
- [Oversight committee bylaws](#)
- [Climate resilience intention](#) guidance document
- [Anti-displacement information and resources](#)
- [Evaluation framework to articulate impact of bond investments](#)
- [Bond dashboard](#) (updated quarterly)

Parks and Nature Bond

From: Parks and Nature Bond
Sent: Friday, April 14, 2023 1:29 PM
To: Parks and Nature Bond
Cc: Beth Cohen; MG Devereux; Melanie Reinert
Subject: Oversight committee pre-meeting materials and message from co-chairs
Attachments: PN OC Meeting 11 Public Agenda_formatted.pdf; slide deck 1_year 2 report.pdf; slide deck 2_ local share update.pdf

Hi Committee members, see below for a message from Burt and Cary:

Hi fellow committee members—

We're looking forward to seeing you at the April 25 committee meeting. Cary will be facilitating the April meeting and we'll be trying out the use of virtual white boards (like mural boards) at the meeting to provide another way to capture the committee's comments and feedback.

Let us know if you will be unable to attend our April meeting if you could please send your questions and/or comments to staff we can make sure they're shared with the entire committee.

We've worked with staff to identify the following areas to focus on that advance the committee's goals for the year:

1. Report backs from the three working groups and identify cross-cutting issues
2. Discuss key themes, edits, adjustments for the committee's year 2 report
3. Hear an update on the status, opportunities and challenges from the bond's local share program, helping the region's 27 park providers invest in parks, trails and natural areas in communities across the region

See attached for the draft slides that staff have developed to tee up the conversation at the April 25 meeting. **Please review the attached 2 slide decks in advance and come to the meeting ready to discuss the questions listed at the beginning of each slide deck:**

- Slide deck 1 on the year 2 report
- Slide deck 2 on the bond's local share program

In addition to these draft slides, you can expect to receive the following additional resources before the April 25 meeting:

- Quarterly report for quarter 3 covering bond activities complete from January-March 2023
- Brief video explainer on the bond's local share program
- A third slide deck providing an overview of the latest bond updates and committee reference materials

Finally see below for some additional resources and reminders from staff.

See you soon!

Burt and Cary

Resources attached and linked

- [Virtual Resource library- draft report materials and working group meeting materials uploaded here](#)
- [Packet from February meeting](#)

- [Link to Parks and Nature's Our Big Backyard](#)
- [Finance working group recording](#)
- [Land acquisition working group recording](#)
- Agenda

Spring 2023 Parks and Nature quarterly update

Covering bond activities and investments from January-March 2023



BOND COMMUNITY ENGAGEMENT COMPLETED: JANUARY-MARCH 2023

From January-March 2023, staff have completed the following outreach across bond programs:

- Conversations with 41 landowners about land acquisition
- 16 conversations with park providers about land acquisitions opportunities
- Three meetings of the [Community Choice grants design and review committee](#) to codevelop and provide feedback on the idea submission process
- 25 community members attended two March information sessions about the [community choice grants](#). See list of organizations who helped spread the word about the event on page 3.

BOND REPORTING AND EVALUATION ACTIVITIES COMPLETED

[A set of infographics](#) are posted on Metro's website to visualize bond progress over time to the public.

These are meant to serve as a compliment to the [storytelling](#) that we have been doing to highlight specific projects and bond wide progress. [The Parks and Nature annual report](#) for FY 2022 and the [Spring 2023 Our Big Backyard](#) are also published.

BOND ACTIVITIES AND INVESTMENTS COMPLETED: JANUARY-MARCH 2023

Protect and restore land activities from January-March 2023

oregonmetro.gov/protect-and-restore-land

The team continues to ramp up outreach to land-owners across the region to create a pipeline of opportunities for acquisition in alignment with the targets and goals approved by the Metro Council in 2022.

Most recently, Metro purchased a 92-acre property in the Abernethy and Newell Creeks target area. The purchase of this property protects several thousand feet of headwater streams in the Upper Holcomb Creek watershed, which will increase the watershed's resilience to climate change, provide cold and clean water downstream, increase stormwater capacity within the watershed, and may help mitigate the downstream impacts of flooding from severe storm events. At over 92 acres, the property's size will enable habitat restoration at a scale that will support healthy populations of native plants and wildlife that can adapt to a changing climate. Restoration work will focus

on Oregon white oak plant communities that support culturally significant native plants.

The team also acquired 5.3 acres in the East Buttes target area via donation and have several more acquisition opportunities in the pipeline. This takes the total parcels acquired as of March 2023 to 13 purchases totaling 484 acres across 10 target areas. See more specific information about acquisitions in the appendix of this report. *(pending)*

At the same time, the team is still building capacity by recruiting two real estate positions for a total of four real estate specialists.

Local share activities completed from January-March 2022

oregonmetro.gov/localshare

The local share team is working with the region's park providers to identify, submit and approve priority projects for bond local share funding.

There are seven projects in review.

- Portland Parks and Recreation has five projects: Whitaker Ponds Natural Area, Wilkes Headwaters Natural Area, Hoyt Arboretum Bristlecone Pine Trail ADA improvements, Park Pathway Lighting Renovation, and Rose City Golf Trails.
- Forest Grove's Stites Park, which will build a nature park with a community garden, picnic, and play areas.

- Wilsonville's Frog Pond West property acquisition, which will protect natural park land within a neighborhood that is currently being developed.

Walking and biking trails activities completed from January-March 2023

Since Council approved [12 trail grant awards for \\$19.5 million](#) across the region from the Clackamas River trail to the Gresham Fairview trail to the Westside trail to Marine Drive trail, the Parks and Nature team is working with grant recipients to execute intergovernmental agreements with park providers by spring 2023 so that project work can move forward.

The team has received and reviewed scopes of work for twelve grant funded projects, a pre-requisite to finalizing and executing intergovernmental agreements with the park providers.

Take care of Metro parks activities completed from January-March 2023

Progress continues on health, safety and accessibility improvements at Blue Lake and Oxbow, where projects are heading towards breaking new ground.

Out at Blue Lake, utility improvements around Blue Lake Park, including municipal water connection and distribution, and sanitary sewer improvements are getting underway. The park will be open on weekends, but the construction project will affect amenities and facilities in a dynamic way as work moves through the

park. Staff are working to minimize disruptions to visitors. At Oxbow, two-car ADA accessible parking spaces will be built at the base of the boat launch. This is part of accessibility work we are doing across Oxbow, and it is the most visible project so far.

Staff are making progress on advancing accessibility improvements in alignment with Parks and Nature's ADA transition plan by developing a systematic process to verify the barriers identified in the ADA transition plan and identify new barriers with a goal to have substantial completion by the end of calendar year 2023.

Nature in Neighborhoods Capital Grants activities completed from January-March 2023

After receiving 16 letters of intent for the initial round of the Nature in Neighborhoods capital grants program ranging from outdoor classrooms to large scale restoration projects to public plazas to nature play, 10 projects were invited to submit a full application by the end of April. These projects include proposals for outdoor classrooms, large-scale restoration projects, public plazas, nature playgrounds and more.

Staff have convened an external review committee to help review applications in May, with the hope of bringing a slate of grant awards for Council consideration and approval in June 2023.

[Nature in Neighborhoods Community Choice grants](#) activities completed from January-March 2023,

The Nature in Neighborhoods Community Choice grants is live and accepting parks and nature project ideas from community members across the region through a web portal and information gathering events in April. The pilot has \$2 million in funding to support projects in District 4, western Washington County. The team hosted two information sessions in March for community members and partner organizations to learn about this process in partnership with park providers—Beaverton, Forest Grove, Hillsboro, THPRD and Washington County.

Large scale community visions activities completed from January-March 2023

Three applications were submitted to the pilot round of large scale community visions for up to \$10 million pilot based on the Council-approved [pilot program handbook](#) to fund larger-scale projects that uplift communities by improving access to nature and/or climate resilience in urban areas with a minimum budget of \$6 million including a minimum \$2 million investment in habitat uplift.

- Trust for Public Land/OSU – Forest Acquisition (\$3.5 million)
- OMSI+CRITFC– Waterfront Education Park (\$10 million)
- Albina Vision Trust – Acquisition/Development \$5 million)

The Metro Council is expected to review these applications and make a determination on next steps in late Spring 2023.

Spring 2023 Parks and Nature quarterly update

Covering bond activities and investments from January-March 2023

*In anticipation of March 2023 information sessions and April 2023 idea generating events to get people interested in the process and ready to submit project ideas, staff reached out to the following organizations in western Washington county with a focus the Elmonica and Aloha communities to attend and share with their networks. Over 25 attendees participated in March information sessions.

- Schools and youth focused organizations (*Merlo Station High School, Meadow Park Middle School, Beaver Acres Elementary School, Chinmaya Mission, Rock Creek Community Association, Westview High School, Raymond Arthur Brown Middle School, McKinley Elementary, 4 Youth, Beaverton High School, Multilingual Department, Beaverton School District, APANO, International School of Beaverton (barely outside of District 4, Quatama Elementary School, Orenco Elementary School, Family Justice Center of Wa. Co, Hillsboro High School, Poynter Middle School, Lincoln Street Elementary School, Eastwood Elementary School, Neil Armstrong Middle School, Cornelius Elementary School, Forest Grove Community School, Forest Grove High School, BSD Black Parent Union)*)
- Organizations focused on the disability community (*People with Disabilities, CACA*)
- Cultural organizations (*Ka'Aha Lahui O 'Olekona Hawaiian Civic Club of Oregon, Asian Health and Services Center, Center for African Immigrants, Latino Network, Centro Cultural, Adelante Mujeres, Muslim Education Trust, Bilal Masjid, Southwest Somali Community, Wisdom of the Elders*)
- Community services organizations (*Homeplate, Beaverton Resource Center, School, Lifeworks NW, Community Action Family Shelter, Bienestar, Vision Action Network, Unite Oregon, Virginia Garcia Wellness Center*)
- Conservation organizations (*Tualatin River Watershed Council*)
- Advocacy organizations/alliances (*National Alliance on Mental Illness (NAMI)*)

Staff also shared information about the April idea generating events through Metro's social media and through press releases in local newspapers

BOND SPENDING: JANUARY-MARCH 2023

As March 2023, Metro has spent \$38 million of bond proceeds available and allocated an additional \$24.8 million in local share and trail grant awards. The full bond spend report as of April 10, 2023 can be found in the appendix. As with other voter investments, administrative expenses tend to be highest in the first few years as new programs are being built. Once the programs are up and running, the administrative expenses as a percentage of total spending decrease significantly, before a small uptick in the last few years of the life of a bond measure.

2019 Parks and Nature Bond - Spend by Program Area

	FY20	FY21	FY22	FY23YTD	Total Spend
Protect/Restore					
Personnel	8,897	1,027,574	1,318,586	1,106,795	3,461,852
M&S or Capital	120,063	843,385	5,104,935	3,793,079	9,861,462
Total	128,960	1,870,959	6,423,521	4,899,874	13,323,314
Take Care of Metro Parks					
Personnel	8,897	642,133	1,334,500	749,078	2,734,608
M&S or Capital	221,847	3,051,112	2,279,728	1,587,037	7,139,724
Total	230,744	3,693,245	3,614,228	2,336,115	9,874,332
Local Share					
Personnel	29,397	213,678	240,033	143,050	626,158
M&S or Capital		2,464	2,492,200	1,582,157	4,076,821
Total	29,397	216,142	2,732,233	1,725,208	4,702,980
Grants					
Personnel	12,847	184,414	240,528	227,929	665,718
M&S or Capital		2,061	85,755	49,539	137,355
Total	12,847	186,475	326,283	277,469	803,074
Trails					
Personnel	8,489	243,278	233,358	194,770	679,895
M&S or Capital	3,825	818	148,071	15,784	168,498
Total	12,314	244,096	381,429	210,554	848,393
Community Visions					
Personnel	-	3,480	121,359	-	124,839
M&S or Capital	-	-	-	-	-
Total	-	3,480	121,359	-	124,839
Total Program Spend	414,262	6,214,397	13,599,053	9,449,219	29,676,932
Admin					
Personnel (tax exempt bonds)	100,692	555,696	591,933	413,776	1,662,097
M&S or Capital or Transfer (tax exempt bonds)	402,467	990,481	2,934,472	1,784,236	6,111,656
Personnel (taxable bonds)	10	330	395	-	735
M&S or Capital or Transfer (taxable bonds)	309,359	27,344	544,812	324,286	1,205,801
Total	812,528	1,573,851	4,071,612	2,522,299	8,980,290
Total Bond Spend	1,226,790	7,788,248	17,670,665	11,971,518	38,657,221
Administrative Spending as a % of Total Bond Spend	66.23%	20.21%	23.04%	21%	

APPENDIX (pending finalization)

DRAFT



Staff report on bond work in calendar year 2022

For the Natural Areas and Capital Program
Performance Oversight Committee

Spring 2023

If you picnic at Blue Lake or take your kids to the Oregon Zoo, enjoy symphonies at the Schnitz or auto shows at the convention center, put out your trash or drive your car – we’ve already crossed paths.

So, hello. We’re Metro – nice to meet you.

In a metropolitan area as big as Portland, we can do a lot of things better together. Join us to help the region prepare for a happy, healthy future.

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Duncan Hwang, District 6

Auditor

Brian Evans

600 NE Grand Ave.

Portland, OR 97232-2736

503-797-1700

Date: March 2023

To: Natural Areas and Capital Program Performance Oversight Committee

Re: Staff report on bond work in calendar year 2022

PURPOSE

The Natural Areas and Capital Program Performance Oversight Committee provides independent oversight of the 2019 parks and nature bond, the remainder of the 2006 natural areas bond and capital investments from Metro's parks and nature five-year local option levy, renewed by the region's voters in November 2022.

As part of this charge, the Metro Council has asked the Oversight Committee to monitor how bond implementation activities are meeting the direction in the bond measure, to monitor financial aspects of program administration and to share with the Metro Council related concerns or recommendations to help adjust work moving forward. This report is intended to summarize information for the committee's review by providing:

1. Snapshot of committee requests for information and staff responses to date
2. Re-cap of bond program investments completed in calendar year 2022
3. Status update on work complete and underway to address and measure progress towards the three bond criteria
4. Reporting on bond spending and other bond financial data as well as any data on capital investments funded by the Parks and Nature levy.

BACKGROUND ON METRO PARKS AND NATURE VOTER APPROVED INVESTMENTS

For more than two decades, voters have repeatedly trusted Metro to protect clean water, restore fish and wildlife habitat and provide opportunities for people to connect with nature close to home through the passage of three capital bond measures and two local option levies.

The voter approved bond measures and levies are linked together to make the region's system of parks, trails and natural areas possible. The three capital bond measures (1995, 2006 and 2019) have supported the acquisition of more than 15,000 acres of priority habitat, investments in parks, trails and natural areas around the region. Metro's parks and nature operating levy, renewed by the voters in November 2022, supports restoration of fish and wildlife habitat on lands purchased with the bond measure, and invests in park operations and improvements and community education, programming and grants to projects designed by community that strengthen people's connection to nature close to home.

OVERVIEW OF KEY THEMES IN 2022 RELATED TO BOND PROGRESS

- Bond refinement is complete; all six bond programs are launched and making investments in the region. Bond investments are ramping up and bond spend is increasing (see bond snapshot below and program specific snapshots)
- Staff are continuing to utilize and employ innovative community engagement approaches to bond projects and to support local park providers in doing the same (see bond criteria snapshot)
- There was significant progress made in calendar year 2022 on setting up strategies to report and measure bond progress on the bond criteria. Early reporting on bond investments as well as interviews and surveys with partners and community members engaging in bond programs point to progress on advancing the three bond criteria and identify areas for improvement.
- Understanding and determining the full impact of bond investments on advancing the bond criteria of racial equity, climate resilience and community engagement over the life of the bond requires more time, more bond investments to analyze.
- In 2022, the Natural Areas Oversight Committee has reviewed in detail several of the bond programs, case studies that illuminate the bond criteria in action and has helped shape frameworks for reporting and evaluating progress.
- In the coming year and beyond, staff will be able to provide to the committee more information, reporting and mechanisms through which the committee can determine progress towards bond spend and bond program goals.

SUMMARY OF BOND PROGRAM INVESTMENTS MADE TO DATE OVER THE LIFE OF THE BOND, AS OF DECEMBER 2022

The following provides a snapshot of the status of each program area and investments completed to date. More detail about the specific engagement activities across bond programs that occurred in calendar year 2022 can be found on page xx).

	Investments made (if applicable)	Awards made (if applicable)	Notable projects
Protect and restore land	Over \$11 million to support 11 acquisitions for 386 acres and 1 trail gap acquisition (1,900 feet)	Not applicable	Acquisition at the Clackamas River confluence Acquisition by Coffee Creek

Take care of Metro parks	Over \$9 million for Chehalem Ridge and Newell Creek completion, Blue Lake Park improvements (water line, building demo) and planning, design and engineering work to advance readiness of projects across the portfolio	Not applicable	Engagement at Lone Fir Cultural Heritage and Healing Garden ADA pilot at Graham Oaks Key infrastructure investments at Blue Lake Park
Local share	\$4 million in local share funds spend to help park providers complete acquisitions (Gresham and Tualatin)	\$5.3 million awarded to THPRD for three projects	Gresham acquisition of site next to SW Community park Tualatin's acquisition of natural areas in Basalt Creek
Trails for walking and biking		\$19.5 million to trail planning and construction projects across the region	Full list of awards here

OVERVIEW OF OVERSIGHT COMMITTEE DISCUSSIONS AND REQUESTS FOR INFORMATION FROM CALENDAR YEAR 2022

As part of its regular oversight and reviewing role, the committee continues to raise issues for further discussion and presentation from staff. Below is a summary list of topics, issues and questions that committee members have raised over the last year and a description of how staff has responded. To date, staff have provided initial responses and information on almost all of these topics and many of the issues require ongoing updates and information from staff, which is denoted as “in progress” in the status column.

Overall bond and committee work

Question/topic/request for information	Date of request	Status or next steps	Staff response to date
How have tribal governments be engaged in bond activities to date?	February 2022	Partially complete; staff will plan to share more information at a future meeting	Staff shared a description from Metro’s tribal affairs liaison about the overall approach to tribal engagement, how we choose the tribes we engage with and who we’ve engaged with thus far.
Accessibility has come up as a major concern, and there’s a strong desire to make sure that parks are welcoming to all people.	Ongoing	Partially complete; will be an issue staff will continue to update committee	Will Cortez, Parks and Nature’s ADA accessibility manager, presented to the community engagement working group on the work he is doing across the department, and also share how we’re applying disability justice lens to work.
Can staff provide more information about how bond activities are advancing racial equity and community engagement? Racial equity and accessibility as part of bond measure. Can this be reflected as a measurable?	Spring 2022, February 2023	Will be ongoing	This is a big question and requires ongoing evaluation and examination; February 23 meeting focused on community engagement activities planned for Blue Lake Park renovation See bond criteria section in staff report reflects progress on racial equity and accessibility criteria
Create more space for discussion at oversight committee meetings	September 2022	Many adjustments	Reserve more space at committee meetings for discussion, not staff presentation.

		are complete, goal is to improve at each meeting	Send out materials more in advance to allow for deeper committee review before meetings and share brief explainer videos about topics coming to committee
Utilize committee working groups	December 2022	Complete	Committee is meeting in three working groups—land acquisition, community engagement and bond finance
Provide easy to access summaries of complex information, dashboards, one-pagers	February 2023	Partially complete (incorporate into materials for 2022 staff report in spring 2023)	Have created online dashboard and bond quarterly reporting Creating 1-2 pagers from 2022 staff report to committee and will keep working to identify opportunities for summary documents
How are bond investments advancing climate resilience?	September 2022	Partially complete and will require ongoing review from the committee	Committee deep dive on climate resilience criteria at December 2022 meeting; See bond criteria section in this report

Land acquisition

Question/topic/request for information	Date	Status or next steps	Staff response to date
Is the focus for land acquisition on enlarging existing areas for large habitats, or small properties in a checkerboard?	December 2021	Complete	It's both. In some new target areas, purchase an anchor piece to build around and in other target areas focus on connecting with already existing anchor sites.
Regarding refinement plans, how frequently do staff reevaluate acquisition plans?	December 2021	Complete	After Council approves the refinement plans, they are typically not amended during the life of the bond. In future years, the real estate team may struggle with success within target areas and then ask the committee for advice for approach within specific acquisition areas.

Question/topic/request for information	Date	Status or next steps	Staff response to date
Does and how does Metro acquire farmland?	March 2022	Complete	Staff provided clarification and background that Metro is not pursuing farmland specifically and is targeting land that meets conservation objectives for the bond measure. Though land important for ecological values near floodplains, adjacent to creeks, etc. can sometimes be in farm use. After acquiring this land, Metro can take immediate stabilization or improvement measures as appropriate, but cannot do everything at once. Typically when Metro purchases a property it comes with a lease that Metro will honor. Metro is not buying non-farmed property and creating new farm leases.
Can staff quantify which land acquisitions meet which climate resilience goals?	December 2022	Complete	Staff developed graphs showing an analysis of acquisitions meeting climate resilience criteria
Is there a way we can track the prices that we're paying, market vs. actual cost?	May 2022	Complete	Information included in quarterly reports to committee
Can staff provide information about stabilization costs per acquisition?	May 2022	Complete	Information is included in quarterly reports to committee
How long is the timeline for bond funded land acquisition?	February 2023	Staff provided context on bond spend timeline at the February 2023 working group	We are working on 8-10 total spend down – staff is conscious of the slower that previous pace due to pandemic and are working to accelerate where possible to keep the spend range as short as possible. Other context is that it's important to remember that we are building on legacy of previous bond measures—Metro completed 500 individual transactions dating back to 1995. Low hanging fruit has been achieved. The transactions now are more complicated or time consuming (require land use or other more involved process)
Add connectivity as a consideration in the closing memos?	February 2023	Partially complete	Closing memos currently discuss connectivity throughout.

Question/topic/request for information	Date	Status or next steps	Staff response to date
			Parks and Nature staff continue to refine closing memo and can consider how to add a more explicit component on connectivity
Can staff provide information about restoration costs are estimated?	February 2023	In progress; staff can provide more information on this topic	In the past, staff have pulled together a summary of restoration cost by major habitat type (stream restoration excluded) divided into easy, typical and difficult, which could provide a sense of costs, but it's probably a bit outdated.

Bond finance

Question/topic/request for information	Date of request/question	Status or next steps	Staff response to date
Continue to review existing and potential strategies to increase participation for contracting with minority, women-owned and emerging small businesses.	Winter 2021/Spring 2022 (year 1 report development)	Ongoing; staff provide information on COBID participation quarterly	Staff will provide more information about strategies to increase COBID participation over the life of the bond
What does it mean to have a 20% floor for the bond? How do you set targets for these goals?	Winter 2021/Spring 2022 (year 1 report development)	Complete	What we are intending by saying COBID participation floor is that at a bare minimum the total bond capital expenditure should be 20% on COBID firms
How do get data that tells us how many qualified suppliers are in a certain area? Is that something we have access to now or is it something we have to buy? How do we go about getting that information?	Winter 2021/Spring 2022 (year 1 report development)	Partially complete	Metro staff knows the number of COBID firms by type of firm (like masonry), but don't know how to measure the larger market share analysis overall. We are lacking both access to the information and an understanding of how to connect COBID data and market share data. This would likely be a project that needs to happen at the agency level, not something that Parks and Nature would be able to do on our own.
Does Metro's COBID participation reporting just apply	February 2023	Complete for now, but staff will	Staff clarified that right now we have capacity only to track COBID

to contractors or sub-contractors?		continue to update committee on this topic	participation for contractors, not sub-contractors
Does Metro's COBID reporting disaggregate by type of contractor? Explore ways for Metro and Parks and Nature to analyze and understand the COBID participation figures on a more granular basis including racial and other identity groups.	February 2023	Complete for now, but staff will continue to update committee on this topic	Staff clarified that currently Metro does not have the tools to do this, but could learn from what jurisdictional partners like city of Portland are doing
Can staff provide more context around bond administrative spend and mile markers that show progress and provide context about bond spend?	February 2022 and February 2023	In progress; staff will provide more information April/May	Staff can provide more detail about what the administrative rate captures (beyond personnel costs to cover a range of professional services and time to facilitate bond investments) and what it does not.
Information about bond spend anticipated in the future	February 2023	In progress; staff will provide more information April/May	Staff are working on projecting out bond spend to future fiscal years. But projections may change over time depending on global variables and unforeseen events.
Do real estate staff anticipate opportunities to accelerate pace of land acquisition with changing market conditions (intersect with land acquisition topics)? What is reasonable to expect?	February 2023	Complete; staff provided an answer and will continue to provide updates to committee	Based on previous trends in real estate market, it takes time when the market changes for it to impact how landowners think about price and selling
What is the relationship between Metro's construction career pathways project and the Regional Workforce Labor Agreement ?	February 2023	Staff plan to provide more information in April 2023	Regional Workforce Equity Agreement implements Metro's Construction Career Pathways Regional Framework As one of the nation's first multi-jurisdictional workforce agreements, it covers specified projects undertaken by Metro, Multnomah County and the City of Portland over the next five years. For Metro, all capital projects of more than \$5 million will be subject to the terms of the agreement.

Community engagement

Question/topic/request for information	Date of request/question	Status or next steps	Staff response to date
Add more detail and information about where community input had feedback on programs, and how that feedback influenced outcomes and activities to engage different audiences, and why we did some of these CE activities, and tell the story of how they link to the bond criteria	Winter 2021/Spring 2022 (year 1 report development)	Partially complete	Staff included more detail about community engagement activities and how it shaped programs in the 2021 staff report and in the 2022 staff report
Is there a community engagement plan in place for the bond?	Winter 2021/Spring 2022 (year 1 report development)	Complete; staff provided an overview of the community engagement framework	<p>Parks and Nature bond has a community engagement framework, which informs each bond program's community engagement plan.</p> <p>Each bond area has a different point where an impact can be made on decisions. For programs like local share, where we're passing money over to jurisdictions, we've provided best practices and frameworks, while recognizing that the variety of providers we work with also means a variety of tools and capacity for doing this work.</p>
What community organizations are engaged in parks and nature bond projects?	February 2023	Partially complete: staff included information in 2022 staff report	Staff will continue to provide case study examples of specific organizations and individuals who are helping shape bond programs and projects
Does Parks and Nature do post-engagement event evaluation?	February 2023	Partially complete; staff included information	<p>Through the bond evaluation outcomes project, we have conducted a small pilot post-engagement effort.</p> <p>In addition, post-engagement evaluation efforts are being planned for</p>

		in 2022 staff report	Blue Lake Park engagement activities in spring/summer of 2023
Can staff provide more detail on how feedback from community engagement has been used and how individuals are being engaged from bond program to program? Doing so helps determine if there is effective engagement if folks involved early on are continuing to be re-engaged.	February 2023	Partially complete; staff included information in 2022 staff report	Staff provided information showing continuity of individuals participating in multiple bond related engagement activities. Staff have not tracked what percent of individuals are engaging activity to activity yet, but that is something we can plan for the future

Findings from committee year 1 report back to Metro Council (presented in Spring 2022)

- The committee finds that staff has conducted the primary components of the bond work reviewed by the committee – bond finance, land acquisition and community engagement – in a transparent and accountable way. The committee looks forward to reviewing progress made across multiple bond program areas as bond investments ramp up in a more detailed manner this year and beyond.
- At this stage, the committee finds Metro's administrative expenditures to be acceptable in light of the very high bar for engagement set by the 2019 bond measure. Committee members have discussed with Metro staff the broader trajectory of administrative spending at the beginning of these types of bond measures and will carefully monitor administrative expenditures over the coming year, with an expectation it will diminish as a percentage of overall bond spending as bond funded investments in parks, trails and natural areas ramp up.
- Channeling its role to share information about the bond measure with the greater Portland community, the committee strongly recommends staff development concise summaries of bond investments and implementation activities to regularly update the public on the work. The committee will also receive quarterly staff reporting on bond implementation activities.
- The committee is committed to ensuring racial equity is prioritized across the entirety of the bond portfolio. The committee has emphasized to staff the importance of carrying these values through all aspects of the bond work and clearly articulating how bond investments are advancing toward these outcomes.
- The committee has emphasized the importance of ensuring bond investments promote accessibility, taking into account the multiple factors that impact the ability of individuals to visit and interact with parks and natural areas in the region. This includes work to make Metro's sites truly safe, welcoming and inclusive for all with a focus on engaging individuals experiencing disabilities to help shape this work. This also includes the identification of

opportunities for investments across the bond to address areas of the region that have minimal parks and natural areas nearby or easily reachable via transit.

- The committee appreciates staff work to facilitate meaningful community engagement to date and believes ongoing community engagement is essential to building programs and projects that truly reflect community priorities and need. The committee looks forward to continuing to work with staff to further evaluate the impact of engagement activities on bond programs and investments over the life of the bond.

DRAFT

PROTECT AND RESTORE LAND

\$155 million allocated for acquisition and restoration of priority habitat across 24 target areas,
<https://www.oregonmetro.gov/protect-and-restore-land>

Program description: Protect and restore land builds on the successes of the 1995 and 2006 natural areas bond measures in protecting greater Portland's special places, by purchasing land from willing sellers and restoring it to help preserve regional watersheds, protect some of the region's rarest habitats, protect culturally important plants and provide opportunities to create future potential access to nature. Since 1995, Metro has completed 500 individual transactions, which means the low hanging fruit has been acquired. The transactions now with the 2019 bond are more complicated or time consuming (requiring land use or other more involved processes).

This program will also invest up to \$10 million to buy land where park providers will one day build regional trail connections.

Key milestones completed in 2022

The Metro Council approved the land acquisition refinement plans in April 2022, land acquisition opportunities are identified and prioritized in alignment with [Council approved land acquisition road maps](#).

Milestones complete (by the numbers)

Category	During calendar year 2022
Number of acquisitions made	5
Acres purchased	115
Total trail gap feet purchased	0 feet
Program dollars spent to support land acquisition	\$11.2 million (2020-December 2022)
Dollars spent on property purchases (see table in appendix for more detail)	
Dollars spent on stabilization projects for land acquired with 2006 and 2019 bond	
Number of real estate strategies completed for the 24 target areas	23 out of 24 target areas

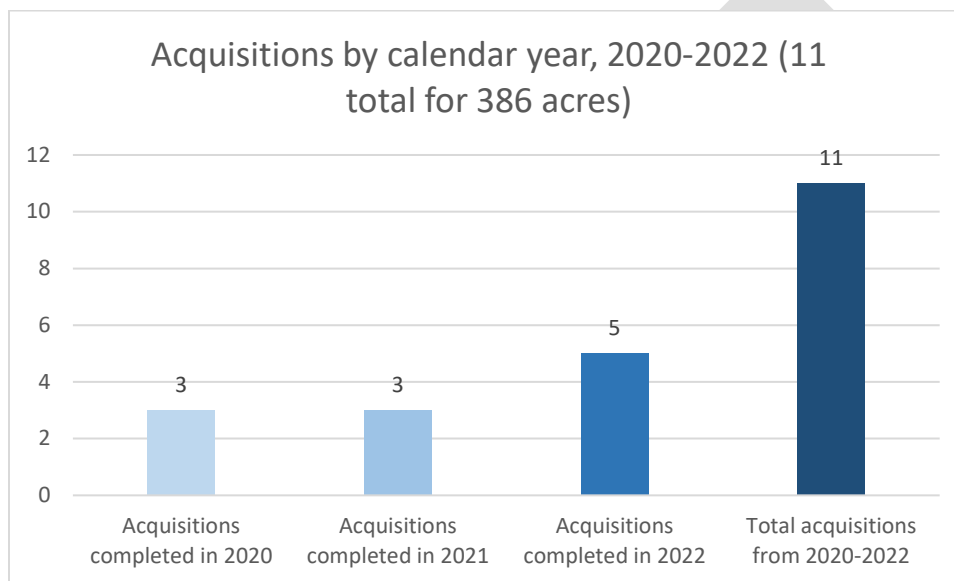
What's next

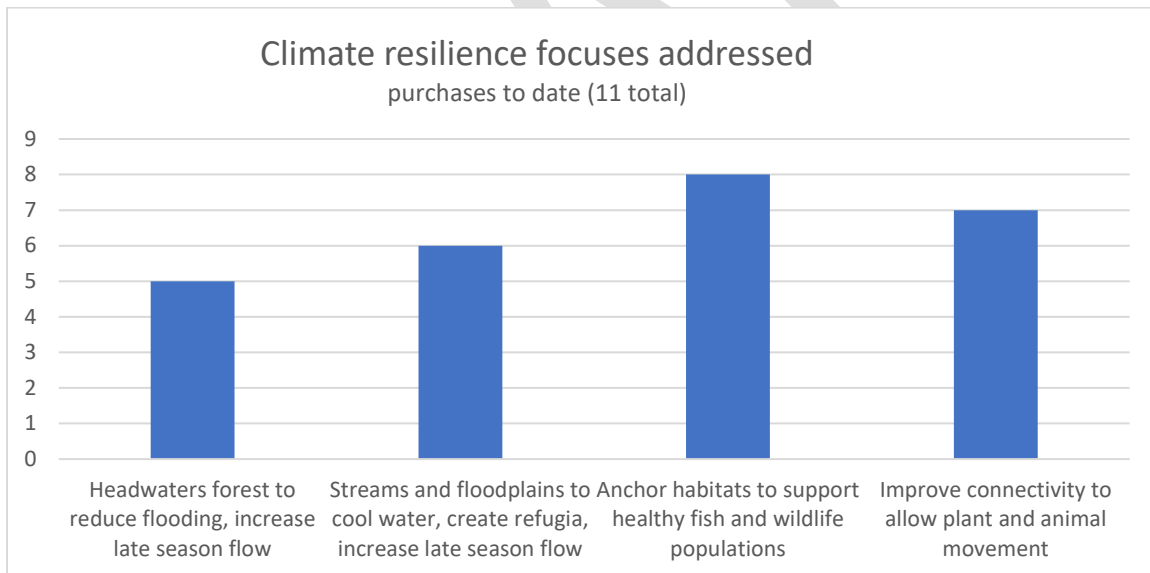
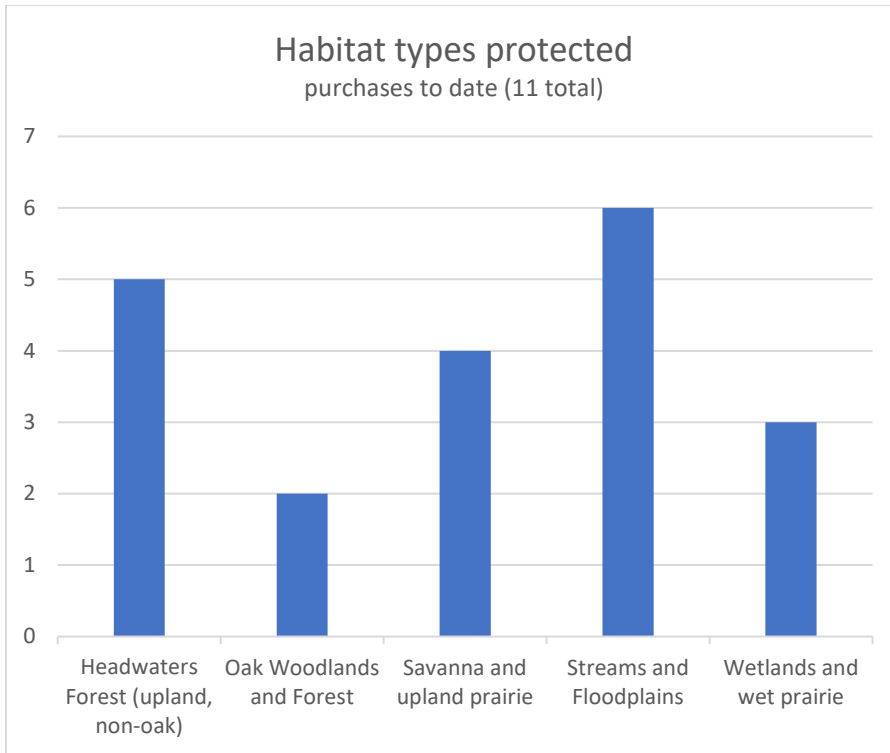
With the Council approved refinement plans setting direction on acquisition and near completion of real estate strategies for each of the 24 target areas, the team will continue ramping up outreach to landowners across the region to create a pipeline of opportunities for acquisition in alignment with the targets and goals approved by the Metro Council this past spring. In 2023, the team expects the pace of acquisitions to increase through increasing staff capacity bringing new folks on board, continued landowner outreach and conversations with park providers across the region. The team

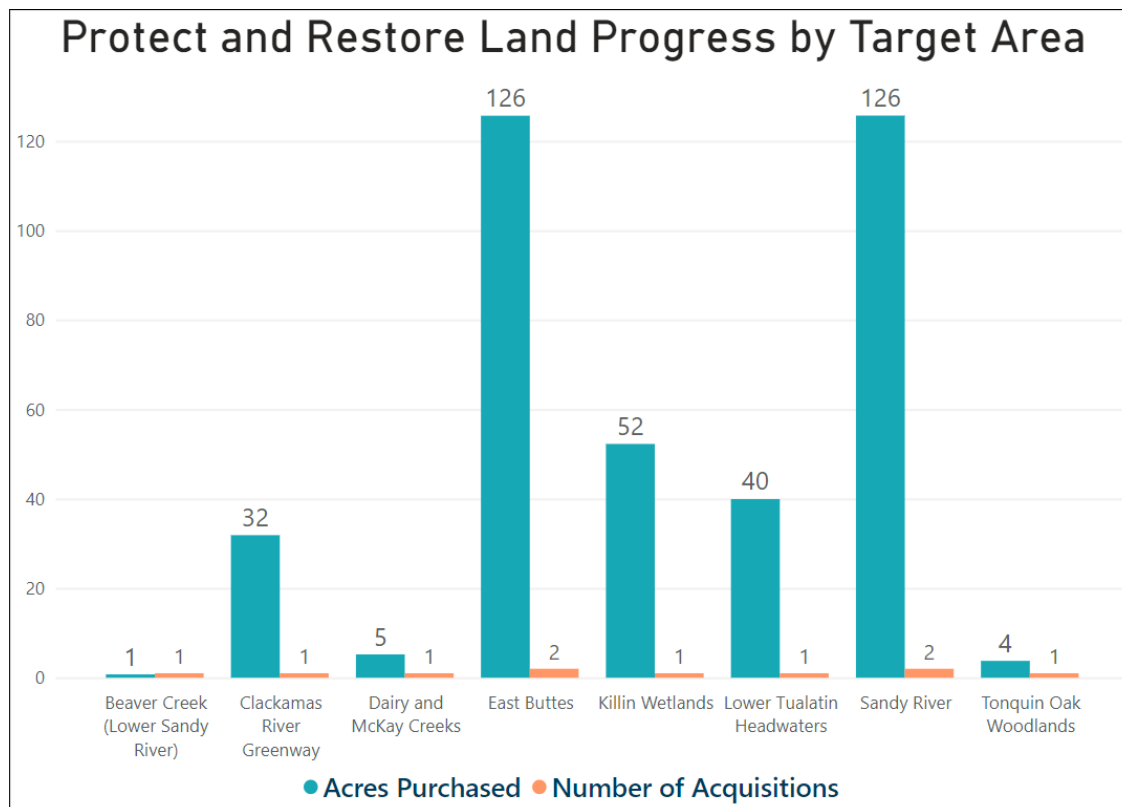
will also explore opportunities to identify community partners to pilot the community led acquisition articulated in the bond measure.

Markers on progress for protect and restore land in 2023 and beyond

- Number of acquisitions made in each of the 24 target areas (see status below as of December 2022)
- Pace of acquisitions each quarter
- Number and balance of each kind of acquisition made to date (in terms of habitat type and how they align with climate resilience criteria).



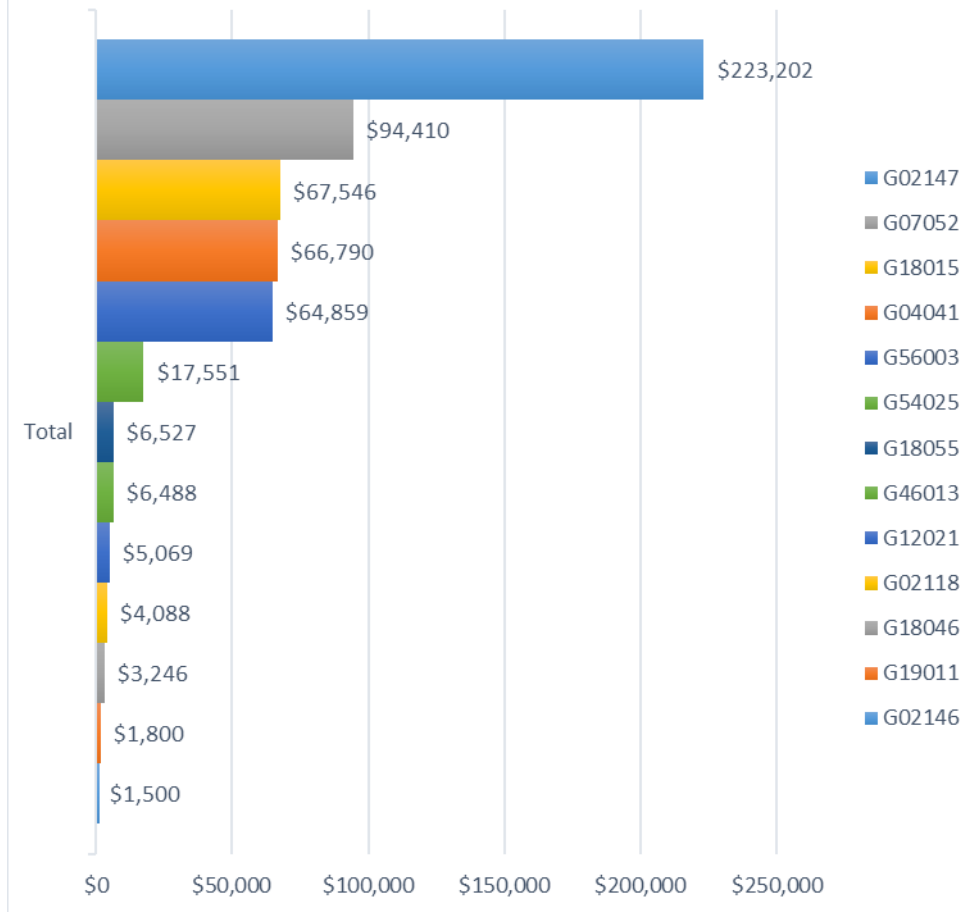




Bond funded stabilization activities

Each property acquired through this program has some stabilization needs that involve land management activities undertaken during the first approximately 5 years that ensure the values of the subject property are not lost with time as we develop long-term restoration and stewardship plans. These actions include infrastructure removal or improvement, replacing invasive species with natives and reducing stream erosion. From 2020-December 2022, \$563,000 of 2019 parks and nature bond spent on 13 stabilization projects

Dollars spent stabilizing property acquisitions



LOCAL SHARE

\$92 million allocated to local governments for park improvement projects and locally important acquisitions, www.oregonmetro.gov/localshare

Program description

The local share program distributes \$92 million to 27 park providers (23 cities, 2 counties and 2 park districts) across the metro area to invest in their community's parks and nature projects including land acquisition, habitat restoration and connectivity, park access facilities at public parks and natural areas, local and regional trails and interpretive or environmental education facilities.

Key milestones completed in 2022

Since 2021, park providers have been submitted priority projects including Gresham's acquisition of a parcel adjacent to Southwest Community Park, Tualatin's acquisition of a parcel near Basalt Creek and Tualatin Hills Park and Recreation's projects that retrofit and expand access to nature in their district. Once park providers submit a project, it is reviewed and approved by Metro staff, upon which an intergovernmental agreement is executed. The local share team is working to support park providers of all sizes to identify projects that meet bond criteria and community priorities.

Milestones complete (by the numbers)

Category	During calendar year 2022
Number of projects awarded funds	5
Number of executed IGAs with park providers	3
Number of projects submitted but not yet awarded funds	5 (PPR, Wilsonville and Forest Grove)
Dollars awarded through executed IGAs	\$10.3 million
Dollars spent	\$4 million
Contacts with park providers	20-plus
Number of roundtables to support learning on bond criteria	2 (community engagement and accessibility), 8 total since 2023 tribal government engagement, workforce and contract equity, anti-displacement, community engagement)

Looking ahead

The local share team will continue to work with the region's park providers to identify, submit and approve priority projects for bond local share funding. The team has executed IGAs with city of Gresham, Tualatin Hills Park and Recreation District and City of Tualatin and is currently reviewing projects submitted by Portland Parks and Recreation, Forest Grove and Wilsonville. In 2023, the team will continue to identify resources and strategies to support the region's park providers in identifying priority projects that address the bond criteria including roundtables, one on one

meetings and site visits. The team will use the findings from interviews and surveys of park providers to inform additional resources to provide.

As additional park providers submit priority projects, the local share team will work with park providers to capture and report on progress made in local funded projects and addressing of bond criteria related to engagement, contracting and other areas.

Markers for progress on local share in 2023 and beyond

- Total number of park providers that have submitted a project or projects for review out of the 27 park providers that have local share funds allocated
- Total number of executed intergovernmental agreements finalized between Metro and park providers for approved projects
- Map showing where projects are located and types of projects
- Reporting from park providers on how they're advancing bond criteria in project selection, development and activation

WALKING AND BIKING TRAILS

\$40 million for building out the regional trails network, oregonmetro.gov/regional-trails-and-greenways-system

Program description: This program provides \$40 million to plan and build out trails that close gaps in the regional trails system via \$10 million for acquisition from willing sellers and roughly \$20 million for competitive grants to local governments to plan, design and build regional trails.

Key milestones in 2022

The trail grant solicitation process, combined with the regional flexible funds allocation, involved collaboration with the region's park providers and transportation agencies and solicited community feedback and engagement through online surveys and convening a work group to help design the solicitation and evaluation process.

In September 2022, Council approved [12 trail grant awards for \\$19.5 million](#) across the region from the Clackamas River trail to the Gresham Fairview trail to the Westside trail to Marine Drive trail, taking a huge step forward in advancing the region's goals for a more equitable and resilient transportation system.

Milestones complete (by the numbers)

Category	During calendar year 2022
Number of projects that applied for trail grant funds	15
Number of projects awarded trail grants	12
Dollars awarded	\$19.5 million
Number of onboarding/trainings with grant recipients	3 (2 onboarding and one training on cultural resources)
Number of unique respondents to online survey on trail grant projects in summer 2022	1500

Looking ahead

The team anticipates that many, if not all of the intergovernmental agreements (IGAs) with the grant recipients for the 12 projects will be executed by March 2023. Doing so, will allow the grant recipients to continue advancing their trail planning and construction projects, begin requesting reimbursements from Metro and reporting on progress to Metro. It is important to note that the timing of the projects will be driven primarily by the grant recipients themselves.

Markers to determine progress for walking and biking trails in 2023 and beyond

- Number of executed intergovernmental agreements with park providers for trail projects out of 12 grant awards
- Number of trail projects at any given time progressing from one stage of project readiness to another.
- Reporting from park providers on how they're advancing bond criteria through their trail projects (community engagement activities, COBID participation and other activities)

NATURE IN NEIGHBORHOODS CAPITAL GRANTS

\$40 million to community groups, non-profits and local governments for projects that “re-green” or “re-nature” neighborhoods, <https://www.oregonmetro.gov/tools-partners/grants-and-resources/nature-grants>

Program description: The Nature in Neighborhoods Capital Grants program 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 listed below. 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.

To date, this program has launched the Nature in Neighborhoods Community Choice grants (formerly the capital grants participatory pilot), which will use a participatory process to recommend up to \$4 million in grant funding to Metro Council to invest in projects selected by the community and that benefit BIPOC and other historically marginalized communities.

Key milestones completed in 2022

In 2022, staff convened the community choice grants program design and review committee to develop a handbook to guide the participatory process for the community choice grants and prepare for the launch of the information sessions and idea collection phases in 2023. Staff also worked to develop a plan to conduct an initial round of the pilot in Metro Council District 4 or Western Washington County.

Milestones completed (by the numbers)

Category	During calendar year 2022
Number of meetings of program design and review committee	16
Number of meetings with park providers in Metro Council District 4 about the community choice grants	~25

Looking ahead

The team launched an initial solicitation for the bond's Nature in Neighborhoods Capital Grants program with letters of intent due in February and a funding recommendation anticipated this summer. These grants are for land acquisitions, urban transformations, restoration projects and neighborhood livability. The resulting capital asset (park, property, building, habitat, etc.) must be publicly owned, however partnerships and collaboration are key to successful projects and non-government organizations can apply for funding.

The capital grants program has helped support some of the region's most beloved places and spaces including Gresham's Nadaka Nature Park, Portland's Cully Park, Milwaukie's Riverfront Park, Tigard's Bull Mountain Park and countless others. As with the capital grants program from the 2006 natural areas bond, we anticipate several rounds of grant solicitations in future years. We look forward to having conversations with you and your teams about projects that may be ready for this solicitation or may be better suited for future rounds.

The Nature in Neighborhoods Community Choice Grants officially launched in March 2023 with information sessions and idea collection events planned for April 2023. The team has hired a contractor to facilitate community engagement throughout this first round of funding. This work includes ensuring as many community members as possible in Metro Council District 4 have a chance to weigh in on which projects will receive funding (up to \$250,000 per project, and \$2 million in total for this first round of funding).

TAKE CARE OF METRO PARKS

\$98 million for safety and accessibility improvements at Metro parks and facilities across the region

Program description: Metro's regional parks, boat launches and cemeteries areas welcome nearly 2.5 million visitors a year to enjoy nature, exercise and cultural gatherings. The take care of Metro parks program funding is a promise to take care of Metro's existing sites by addressing capital maintenance, repair and improvement needs at Metro facilities and completing nature parks with adopted master plans and in 2022, progress continued on health, safety and accessibility improvements at Blue Lake and Oxbow.

In 2022, the following milestones were accomplished

- At Blue Lake Park, construction for the new water line and work to remove defunct buildings.
- At Oxbow Regional Park, the Oxbow Road Analysis project is developing a construction plan for repair of the aging potable water system and road to correct drainage and asphalt sloughing.
- Work continues on developing the long-term framework to support Americans with Disabilities Act (ADA) improvements across the Metro portfolio. Improvements will kick off with a pilot at Graham Oaks Nature Park to address barriers to access. The intent of the pilot is to inform next steps with a focus on scaling up the work and determining the applicable accessibility standards at one site and apply to the entire portfolio.
- 21 projects at Blue Lake, Oxbow, and Lone Fir prioritized for bond funding
- \$9M spent to date on 9 completed projects
 - Completed Chehalem Ridge and Newell Creek
 - Completed Blue Lake Park utilities and facilities plan, water line phase 1, building demo
 - Projects underway at BLP include: Water line phase 2, sanitary sewer, Curry building remodel/new office building and maintenance yard improvements
- Oxbow road and water: Design/engineering underway, ADA improvements included
- Engagement underway: Around Lone Fir Cultural Heritage and Healing Garden
- Launching: ADA accessibility pilot at Graham Oaks

Take Care of Metro parks milestones complete (by the numbers)

Category	During calendar year 2022
Programs dollars invested to complete projects across Metro's portfolio	
Number of TCMP bond funded projects complete (construction)	6
Number of TCMP bond funded projects complete (planning projects)	0
Number of TCMP bond funded projects in construction	2 (Blue Lake Park Building demo and water system phase 1)
Number of TCMP bond funded projects in design and engineering	6 (Blue Lake park dock demolition, Blue Lake Park operations and maintenance facility, Blue Lake Park sanitary sewer, Blue Lake

	Park water system phase 2, Oxbow boat launch, ADA improvements, Oxbow potable water)
Number of TCMP bond funded projects in planning	4 (ADA transition plan, Blue Lake Park renovation, Lone Fir Cultural Heritage and Healing Garden, Willamette Cove remediation)
Number of TCMP bond funded projects in project development	2 (Oxbow road improvement, Graham Oaks ADA pilot)
Number of community engagement activities for Metro park improvements	2 (with members of the Chinese community around Lone Fir Cultural Heritage and Healing Garden)

Looking ahead

In 2023, improvements and activity at Blue Lake Park are expected to continue ramping up. In addition, community engagement around the park renovation and master plan will begin in 2023. Consultant hired to lead the planning/design effort. Community engagement to begin in earnest in FY23.

Work continues on bond-funded projects to improve the health, safety and accessibility of Blue Lake and Oxbow regional parks. The Blue Lake Park water line phase 1 project and building demolition – including the Lake House, beach restrooms, boat house, concessions stand and park office – are substantially complete. Work to increase ADA access at the Oxbow boat launch is kicking off with the creation of two accessible parking spaces.

Markers to demonstrate progress on take care of Metro parks in 2023 and beyond

- Number of projects out of priority list substantially complete
- Number of capital projects moving through different stages (planning to project development or design and engineering)
- Number and status of projects related to increasing accessibility across the site (ADA pilot at Graham Oaks park and improvements at Oxbow boat launch parking)
- Reporting on engagement participation and findings for Blue Lake Park renovation and Lone Fir Cultural Healing and Heritage Garden projects

LARGE SCALE COMMUNITY VISIONS

\$50 million for green investments in regional transformative projects,

<https://www.oregonmetro.gov/tools-partners/grants-and-resources/large-scale-community-visions>

Program description: The Metro Council created the large scale community visions program to fund regionally significant catalytic investments that re-green communities and connect parks and nature with other community assets such as transportation and affordable housing. \$20 million is set aside for the Willamette Falls Legacy Project.

Since August, a notice of funding availability for an initial \$10 million pilot grant cycle has been open. Since then, staff have completed meetings with 10 potential partners around the region to solicit interest and assess project compatibility with the Council approved [pilot program handbook](#) to fund larger-scale projects that uplift communities by identifying projects that are dedicated to improving access to nature and/or climate resilience in urban areas with minimum budget of \$6 million minimum including a \$2 million investment in habitat uplift.

In spring 2022, Metro Council approved a handbook for a pilot project solicitation of up to \$10 million looking for projects that cost at least \$6 million and are devoting at least \$2 million of that to habitat restoration. Since then, Metro Parks and Nature staff have been working with a variety of community organizations and public entities to solicit responses. In addition, the Parks and Nature team consulted with staff from the [Transit Oriented Development](#) team to identify potential opportunities to solicit project ideas and to receive feedback on the overall approach to the pilot.

During the letters of intent solicitation which closed on October 2022, 4 submissions were received. Since then, Parks and Nature staff have met once with each of these applicants to understand more about the project and request for funding.

- Trust for Public Lands/Oregon State University – Acquisition of private timber site in the Tualatin Mountains area
- Portland Botanical Gardens – Site acquisition on the Willamette River near Willamette Cove
- OMSI/CRTFIC – Waterfront Education Park and OMSI district catalyst on the Willamette River
- Albina Vision Trust – Site acquisition adjunct to Willamette River

Milestones complete (by the numbers)

Category	During calendar year 2022
Number of letters of intent submitted	4
Number of conversations with partners to generate letters of intent for fall 2022 solicitation	10

Looking ahead

Each of the four projects that submitted a letter of intent has provided a presentation about their project to a team of Metro staff in order to help the Parks and Nature team establish a deeper context about the project proposals and a clearer understanding of how each applicant thinks the projects match to the overall 2019 bond criteria and program goals as outlined in the program handbook as well as bond requirements.

All four letters of intent are moving into the detailed application phase with an eye towards having Council consider and approve an initial funding round by spring 2023.

Markers to determine progress on large scale community visions in 2023 and beyond

- Number of awards made by the Metro Council in the pilot round
- How awarded projects are advancing through anticipating stages of work identified during application
- Reporting from grant recipients on how they're advancing bond criteria in project development, advancement and activation

ADDRESSING THE BOND CRITERIA

The Metro Council included three overarching criteria to govern 2019 parks and nature bond programs: racial equity, climate resilience and community engagement.

The three bond criteria are complex and layered concepts; progress will be ongoing and won't happen all at once. Determining whether and how bond programs taken together are making progress on addressing the bond criteria requires an understanding of the different ways that each of the six bond program areas are doing so—either by providing direction to community grant or local share recipients or by incorporating into Metro's investments at its facilities and sites across the region.

There was significant progress made in calendar year 2022 on setting up strategies to report and measure bond progress on the bond criteria. The development and refinement of an evaluation process that builds upon and broadens current efforts to report on specific investments in parks, trails, and natural areas articulates progress towards meeting bond outcomes over the life of the bond by setting primary, secondary and tertiary outcomes based on a theory of change. The recently completed data collection pilot tested the utility of this framework by conducting interviews and surveys of with Parks and Nature partners and community members around the impact of participating in bond funded activities and investments to date.

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.

Improve the accessibility and inclusiveness of developed parks.

2022 COMMUNITY ENGAGEMENT HIGHLIGHTS

Engagement activities completed

Ongoing collaboration with the region's park providers on meaningful engagement

- 2 roundtables, 20 conversations with region's park providers
- Meetings with park providers in District 4 to launch community choice grants pilot

Engagement with committees to shape solicitation for grants

- 16 meetings of community committee for community choice grants
- 2 meetings of performance metrics working group to ensure trail grant solicitation was shaped by working group of community representatives, trail advocates, and external government partners.

Surveys received comments from over 3,000 respondents

- 1,700 responses to online survey on land acquisition priorities (in 5 languages) and 1500 unique responses to survey on trail grants

Partnerships with community-based organizations, government agencies, businesses to better reach the diverse communities of the region in the following engagement

- 6 BIPOC focused roundtables on land acquisition priorities
- Meetings with urban Indigenous community on land acquisition priorities
- 2 engagement sessions with Chinese community on Lone Fir

How it shaped programs

- 12 priority projects submitted for local share funds reflect community feedback
- Council approved land acquisition road maps include areas highlighted by the community like Johnson Creek watershed
- Solicitation for trail grant awards shaped by community, trails advocates; 12 trail projects funded are important to community
- Handbook for community choice grants shaped by community grants program design and review committee

Evaluation

- Interviews and surveys with individuals who participated in 3 engagement processes to date (more planned)
- Building list of partners and individuals who participated in multiple engagement opportunities to invite to future engagement activities

Tools, strategies developed and utilized to advance community engagement efforts across bond programs

- Ongoing partnerships with community-based organizations, government agencies, businesses, and other groups to better reach diverse communities
- Reduce barriers to participation (translation, interpretation and childcare)
- Offering stipends to community members to honor their time, energy and expertise
- Organizing focused engagement opportunities for BIPOC communities to increase participation and continue to build trust
- Continuing to provide multiple avenues for community members to get involved such as surveys and online and in-person events
- Using information learned from one bond program to inform other relevant parks and nature work
- Collaboration with the region's park providers on meaningful engagement

Community engagement case study: Community Choice grants

The parks and nature bond's community choice grant program, which has recently launched in Western Washington County, provides a great example of community engagement activities complete, and activities planned as well as an understanding of how efforts connect.

Fall 2021-Spring 2022: Pre-launch/program design and review community work: Staff partnered with a community committee, the program design and review committee on the development of the solicitation guidebook. Staff conducted a broad recruitment for committee members in fall and winter 2021. 44 people applied and 6 were chosen to be on the program design and review committee. The committee has met 16 times since winter of 2022 to help shape the community choice grants guidebook for project solicitation. Staff shared the recruitment opportunity with the following partners to share with their networks.

East Portland Action Plan, Q Center, North Clackamas Urban Watershed Council, 1000 Friends of Oregon, Friends of Trees, Audubon Society of Portland, Oregon Trails Coalition, East Portland Parks Coalition, Urban Greenspaces Institute, NW Trail Alliance, PSU Center for Public Service, PSU Nat'l Policy Consensus Center, PSU Hatfield Fellowship Program, PSU Student Inclusion Coordinator, PSU College of Urban & Public Affairs, Momentum Alliance, OPAL, Centro Cultural, Lara Media, Kairos PDX, Latino Network, Rosewood Initiative, Historic Parkrose, Getting There Together Coalition, Oregon Walks, NAYA, Utopia PDX, APANO, CETI, Community Cycling Center, Immigrant and Refugee Community Organization (IRCO), Depave, Urban League of Portland, Adelante Mujeres, Unite Oregon, Betties 360, Wild Diversity, Verde, POC Hikes, People of color outdoors, Black Community of Portland, Black Food Sovereignty Coalition

Winter-Spring 2023: Idea collection phase: In anticipation of March 2023 information sessions and April 2023 idea generating events to get people interested in the process and ready to submit project ideas, staff outreached to the following organizations in western Washington county with a focus on the Elmonica and Aloha communities to attend and share with their networks. Over 25 attendees participated in March information sessions.

- Schools and youth focused organizations (*Merlo Station High School, Meadow Park Middle School, Beaver Acres Elementary School, Chinmaya Mission, Rock Creek Community Association, Westview High School, Raymond Arthur Brown Middle School, McKinley Elementary, 4 Youth, Beaverton High School, Multilingual Department, Beaverton School District, APANO, International School of Beaverton, Quatama Elementary School, Orenco Elementary School, Family Justice Center of Wa. Co, Hillsboro High School, Poynter Middle School, Lincoln Street Elementary School, Eastwood Elementary School, Neil Armstrong Middle School, Cornelius Elementary School, Forest Grove Community School, Forest Grove High School, BSD Black Parent Union*)
- Organizations focused on the disability community (*People with Disabilities, CACA*)
- Cultural organizations (*Ka'Aha Lahui O 'Olekona Hawaiian Civic Club of Oregon, Asian Health and Services Center, Center for African Immigrants, Latino Network, Centro Cultural, Adelante Mujeres, Muslim Education Trust, Bilal Masjid, Southwest Somali Community, Wisdom of the Elders*)
- Community services organizations (*Homeplate, Beaverton Resource Center, School, Lifeworks NW, Community Action Family Shelter, Bienestar, Vision Action Network, Unite Oregon, Virginia Garcia Wellness Center*)
- Conservation organizations (*Tualatin River Watershed Council*)
- Advocacy organizations/alliances (*National Alliance on Mental Illness (NAMI)*)

Detailed snapshot of progress on community engagement and accessibility by bond program

	Efforts completed to date	Outcomes measured to date	Reporting efforts to come
Protect and restore land	<p>2020-2022: Several meetings with cohort of urban Indigenous community members, focusing on influence over decision points</p> <p>2021-2022: 6 affinity group roundtables, in English and Spanish, for BIPOC and people with disabilities in fall 2021 (with over 100 participants) and 2 report back sessions with Spanish translation in winter 2022 (with 60 participants)</p> <p>2022: survey on land acquisition priorities translated into 5 languages received over 1,700 responses</p>	<p>Engagement shaped the key themes and priorities for acquisition including the addition of areas inside the urban area target area like Johnson Creek and also the trail segments that will be prioritized for acquisition through our willing seller program.</p> <p>Bond evaluation outcomes project pilot data collection surveyed urban Indigenous community members on participating in engagement on land acquisition activities</p>	<p>Revised land acquisition closing memo: more thoroughly describing how each purchase meets bond criteria and priorities heard through community engagement</p> <p>Mapping of land acquisitions made to date</p>
Take care of Metro parks	<p>2022: Engagement around Lone Fir Cultural Heritage and Healing Garden</p> <p>Planning work for ADA improvements to Oxbow boat launch parking complete with construction beginning in 2023</p>	<p>Bond evaluation outcomes project captured feedback from participants in Chehalem Ridge planning</p>	
Local share	<p>Ongoing: Metro staff continue to provide support to park providers working to engage marginalized communities in project selection, development or site activation</p>	<p>Bond evaluation outcomes project interviewing park providers on impact of community engagement efforts to date</p> <p>Local share projects funded to date reflect focus on community engagement and accessibility (acquisition of site near Gresham's</p>	<p>Metro requires local share recipients to conduct community engagement as part of their projects and their annual reports will summarize efforts on engagement and accessibility.</p> <p>Follow up with park providers on community engagement efforts in future years</p>

	Efforts completed to date	Outcomes measured to date	Reporting efforts to come
		SW community park, THPRD projects	
Trails	<p>Fall 2021-spring 2022: Trail grant solicitation was shaped by working group of community representatives, trail advocates, and external government partners.</p> <p>Summer 2022: Online survey (translated into 5 languages) on trail projects for funding received 1,798 project-specific comments from 1,551 unique respondents.</p>	<p>Survey responses were considered in trail grant project selection.</p> <p>Working group membership and participation from community-based organizations helped shape grant solicitation process</p>	Metro requires grantees to conduct community engagement as part of their projects. Grantees' annual reports will summarize engagement efforts.
Capital grants	<p>Fall 2021: outreach to recruit community members to join the community choice grants program design and review committee (see community choice grants case study)</p> <p>Winter 2021-spring 2022: deep engagement with community choice grants program design and review committee to develop the program handbook for the community choice grants</p>	Community choice grants program handbook reflects the values and priorities of the program design and review committee and is aligned with bond and program criteria	<p>Interviews/surveys of individuals participating in community choice grants process</p> <p>Projects (type, location) selected through the community choice grants</p>
Large scale community visions	Fall 2022: during the solicitation period for the large scale community visions pilot involved talking to over 10 community organizations, park providers		Projects will be required to report annually on community engagement efforts

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.

Tools and strategies developed in 2022 to advance accountability in reporting

- Significant progress developing and piloting an evaluation framework for the bond. Working with a consultant, Dialogues in Action, staff articulated long term impacts for bond investments and activities meant to align with the bond criteria. This summer, the team launched a data collection pilot to test the framework developed and to collect preliminary findings that pointed to impact and identified areas for improvement.
- [Dashboard on bond progress on website](#)
- Quarterly reports to oversight committee
- Land acquisition closing memos to Council and the oversight committee summarizing key features and bond criteria met for each property purchased

Include strategies to prevent or mitigate displacement and/or gentrification resulting from bond investments.

Tools and strategies developed in 2022 to advance understanding of strategies for mitigating displacement.

- This criteria is one that extends beyond what Metro Parks and Nature can be responsible for alone.
- Parks and Nature have identified helpful ways to think about making progress on this criteria, which involves opportunities for community members to truly help shape projects in their own communities, to benefit economically through workforce and contracting opportunities, and that these considerations have been integrated as part of ongoing review of local share projects that are submitted for Metro review
- In 2022, significant progress has been made to advance programs or processes that allow community to shape investments directly. The Community Choice grants in Metro Council District 4 provide an opportunity for a specific community to help identify, shape and select project priorities through piloting participatory budgeting principles, and the pilot round of solicitation for the large scale community visions program has begun.

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.

Tools and strategies developed in 2022 to advance contract and workforce equity

- Metro continues to identify, implement and evaluate strategies to increase the participation of COBID contractors for bond funded contracts in alignment with agency-wide priorities and

protocol. Staff working on several bond programs have encouraged prime contractors to partner with COBID certified firms as sub-contractors.

- In addition, staff will continue to explore ways for Metro and Parks and Nature to analyze and understand the COBID participation figures on a more granular basis including racial and other identity groups as well as exploring the capacity to track COBID participation for sub-contractors.
- In April 2022 Metro officially signed the [Regional Workforce Equity Agreement](#), which covers projects undertaken in the next five years by Metro, Multnomah County and the City of Portland. It implements Metro's [Construction Career Pathways Regional Framework](#) and will be a key tool in creating and sustaining construction careers for women and people of color across the Portland region. The contract for the Blue Lake Park Curry Building was the first to incorporate workforce requirements in alignment with this agreement and will allow for setting and meeting specific workforce participation goals once this project begins construction.
- Parks and Nature staff are working with other teams at Metro to develop guidance documents and technical assistance and access to resources for park providers advancing construction projects that meet construction costs thresholds established by the Construction Career Pathways Regional Framework that require tracking workforce participation and advancing specific goals for participation of people of color, women and apprentices.

Snapshot of progress made around the bond's racial equity criteria

	Efforts completed to date	Outcomes measured to date	Reporting efforts to come
Protect and restore land	Themes heard through community engagement with BIPOC communities in 2021 and 2022 are prioritized in land acquisition road maps Initial analysis conducted in 2021 and 2022	COBID participation rate across the bond	Exploring more fine grained COBID participation tracking and strategies to increase COBID participation for prime and sub-contractors
Take care of Metro parks	Incorporating Metro's Construction Career Pathways Framework requirements for diverse workforce participation in Metro's own projects	COBID participation rate across the bond	Tracking on workforce participation for Metro's construction projects (likely to begin when construction kicks off in fiscal year 2024)
Local share	COBID and workforce requirements apply to local share projects	Bond evaluation outcomes project interviewing park providers on efforts to advance racial equity	Mapping of local share projects over time with other data layers (equity focal areas)

	Efforts completed to date	Outcomes measured to date	Reporting efforts to come
	Attention to anti-displacement		
Trails	Match requirements for trail grants prioritized equity focal areas within a mile of the project COBID and workforce requirements apply to trails construction projects		Mapping of trail projects awarded across the region
Community Choice grants	Focus of community choice grants in underserved neighborhoods of District 4 (Aloha and Elmonica)		Reporting on projects (location and type) selected through community choice grants process
Large scale community visions			Projects that receive funding will be asked to report on activities related to advancing racial equity

BOND 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.

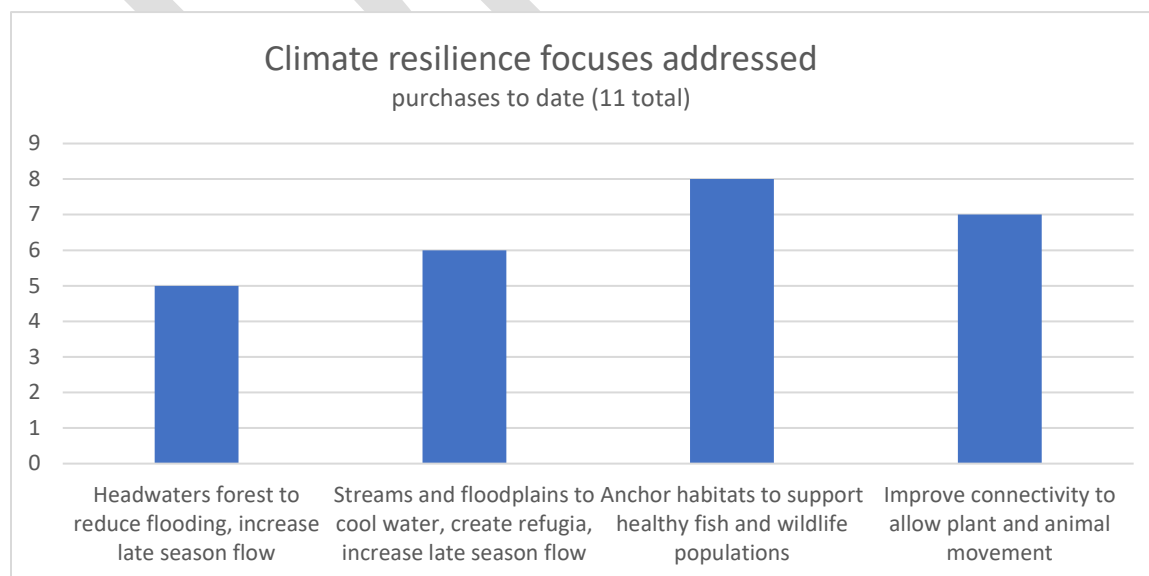
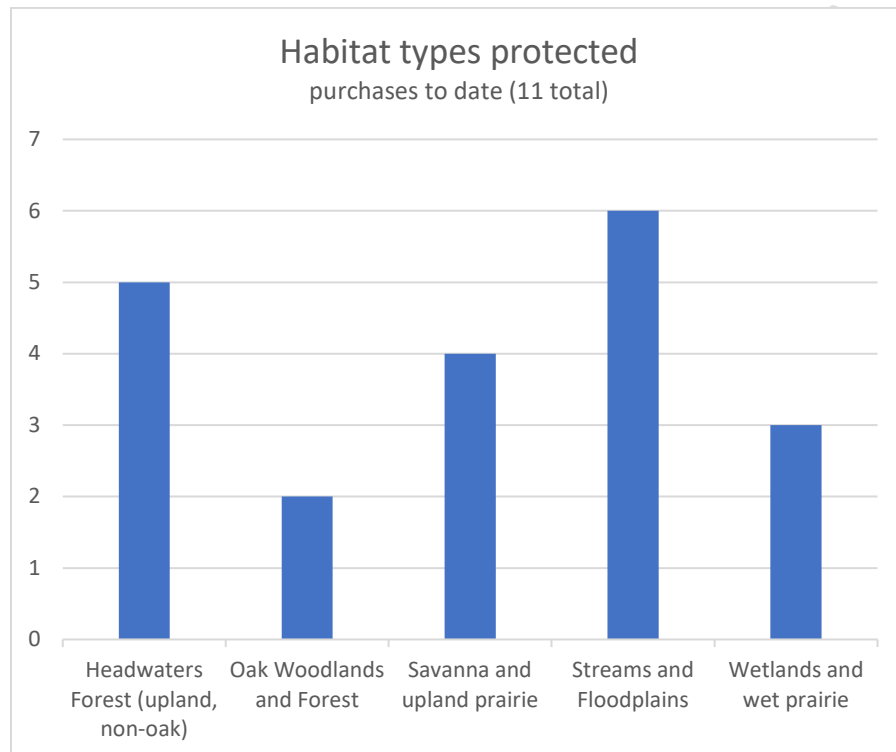
Increase tree canopy in developed areas to reduce heat island effects.

Use low-impact development practices and green infrastructure in project design and development.

Invest in segments of the regional trail system to expand active transportation opportunities for commuting, recreation and other travel.

Tools and strategies developed in 2022 that help advance climate resilience criteria

- Metro's policies around low impact design (sustainable buildings) and clean air construction standard will be incorporated into construction of bond funded capital projects at Metro sites.
- Staff developed and reviewed with the oversight committee a results chain and framework that connects bond funded land acquisition activities to the bond's climate resilience criteria
- Staff developed initial analysis that allows for tracking of how individual land acquisitions address the bond's climate resilience criteria

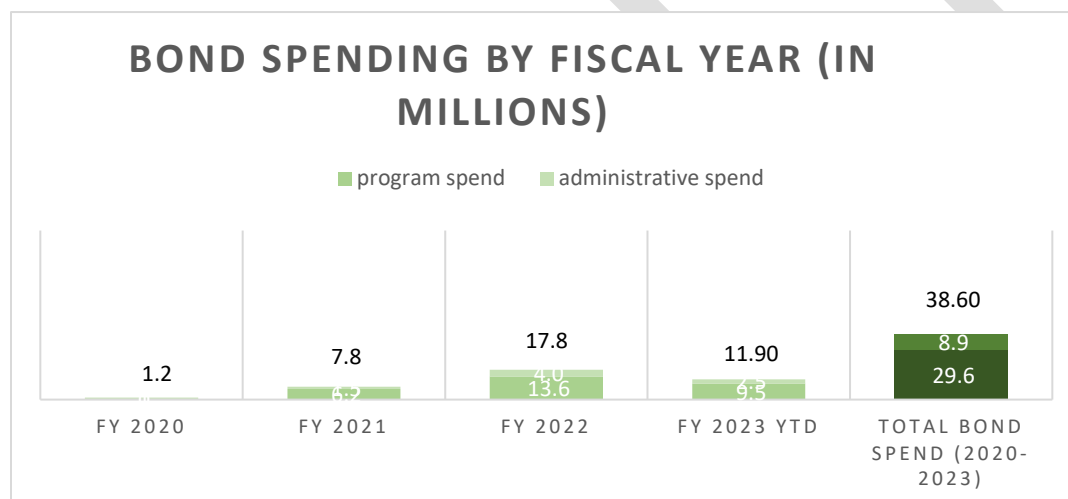


BOND FINANCIAL REPORTING

The committee regularly reviews financial reporting for the limited remaining money from the 2006 natural areas bond, capital investments from the parks and nature levy, and the 2019 parks and nature bond. Financial data is tracked by Metro's fiscal year, which goes from July 1 through June 30.

Metro issued the first round of bonds on April 21 2020. So far, Metro has issued \$200 million in bonds for the start of this what may be a 16-year program. At the time of the bond sale, Metro was able to take advantage of historically low interest rates and earn a return while preparing to spend in the form of a bond premium.

As of early April 2023, Metro has spent \$38 million of bond proceeds available and has been awarded \$24.8 million through trail grants and local share. Here is how spending breaks down by program area. The current administrative rate of 23 percent of total bond spending to date or approximately \$4 million.



As with other voter investments, administrative expenses tend to be highest in the first few years as new programs are being built. Once the programs are up and running, the administrative expenses as a percentage of total spending decreases significantly, before a small uptick in the last few years of the life of a bond measure. We fully expect administrative expenses with the 2019 parks and nature bond measure to have a similar trajectory.

Looking ahead

As staff has shared with the committee, there is the anticipation that bond spend and bond funded awarded will increase significantly beginning in fiscal year 2024 (starting in summer 2023) due to:

- Continued ramp up of land acquisition activities due to building pipeline through steady landowner outreach in 2022
- Ramp up of construction projects at Blue Lake Park

In addition, in the next 1-2 years, there is the anticipation that bond spend on local share and trail grant projects will increase significantly as awarded projects commence and begin to request

reimbursements. By FY 2026, there will be a large amount of reimbursement requests for the local share and trails projects.

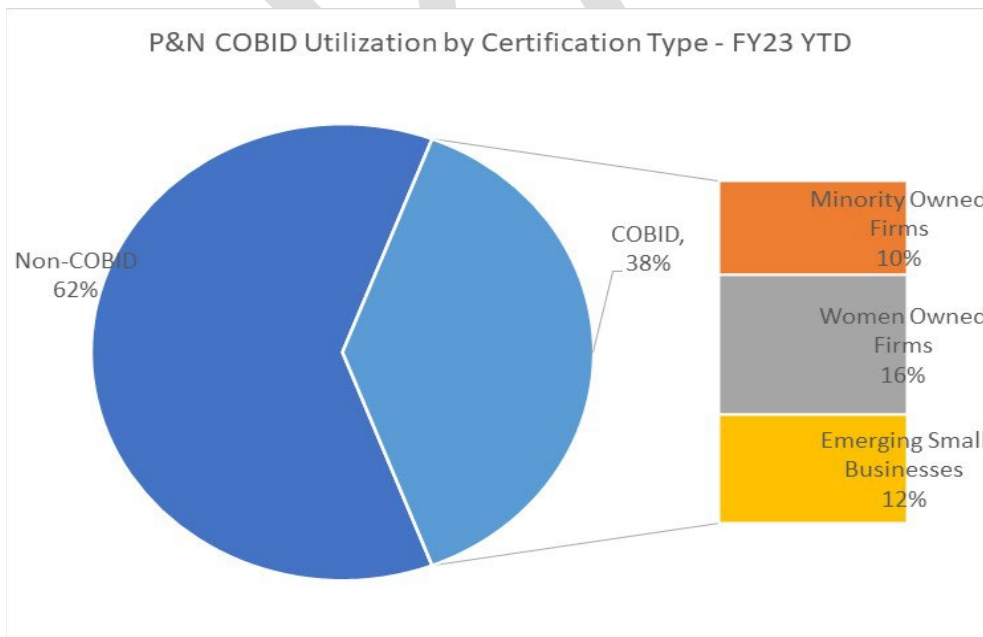
COBID spending

Metro tracks the percentage of bond spending with minority owned, women owned and emerging small businesses that are certified with [Oregon's Certification Office for Business Inclusion and Diversity \(COBID\)](#). In addition, Metro tracks the spending percentage with each type of COBID certification (minority owned, women owned and emerging small businesses, service-disabled veteran-owned).

Metro's participation reporting method removes work that cannot reasonably be performed by a COBID-certified firms from the participation rate calculation. Metro excludes the following types of contracts and payments from the calculation:

- Services provided by another public agency that do not compete with the private sector
- Services for which there is a single or limited group of businesses, none of which are COBID-certified
- Services mandated by Oregon Law (Oregon Revised Statutes) to be provided by qualified rehabilitation facilities

Metro continues to identify, implement and evaluate strategies to increase the participation of COBID contractors for bond funded contracts in alignment with agency-wide priorities and protocol. In addition, staff will continue to explore ways for Metro and Parks and Nature to analyze and understand the COBID participation figures on a more granular basis including racial and other identity groups. Currently Metro may not have the tools to do so, but could learn from what other agencies are doing.



Looking ahead

In 2023 and beyond, staff will continue to track COBID participation rates to the 20% COBID participation floor across the bond. Staff will also explore opportunities to improve how we're tracking COBID participation across all our large contracts.

In addition, in future years, staff will begin to track workforce participation on bond projects like Blue Lake Park Curry Building that are part of the [Regional Workforce Equity Agreement](#), meaning there will be opportunities to report to the Natural Areas Oversight Committee on participation in specific construction projects of people of color, women and apprentices and training and support strategies to ensure participation in alignment with the goals of the regional workforce agreement.

2006 natural areas bond measure

Metro sold the remaining 2006 bonds in spring 2018. Remaining funds from the 2006 bond measure are close to being spent or are dedicated to upcoming projects or acquisitions. Staff will continue to provide the 2006 natural areas bond spending report to the oversight committee until funds are completely spent and the bond is closed out.

Local option levy

Metro's parks and nature local option levy protects clean water, restores fish and wildlife habitat at natural areas across the region and connects people with nature across 18,000 acres of parks, trails and natural areas through investments in capital projects and programs. In November 2022, the voters of the region approved a five-year renewal of the parks and nature levy. The Natural Areas Oversight Committee will review any capital investments supported by the levy. In the last calendar year, the levy did not fund any capital investments, but in future years, the committee can expect to review levy-funded capital projects at Metro's parks, trails and natural areas.

2019 Parks and Nature Bond - Spend by Program Area						
	FY20	FY21	FY22	FY23YTD	Total Spend	Percent of All 2019 Bond Spend
Protect/Restore						
Personnel	8,897	1,027,574	1,318,586	1,106,795	3,461,852	
M&S or Capital	120,063	843,385	5,104,935	3,793,079	9,861,462	
Total	128,960	1,870,959	6,423,521	4,899,874	13,323,314	34.47%
Take Care of Metro Parks						
Personnel	8,897	642,133	1,334,500	749,078	2,734,608	
M&S or Capital	221,847	3,051,112	2,279,728	1,587,037	7,139,724	
Total	230,744	3,693,245	3,614,228	2,336,115	9,874,332	25.54%
Local Share						
Personnel	29,397	213,678	240,033	143,050	626,158	
M&S or Capital		2,464	2,492,200	1,582,157	4,076,821	
Total	29,397	216,142	2,732,233	1,725,208	4,702,980	12.17%
Grants						
Personnel	12,847	184,414	240,528	227,929	665,718	
M&S or Capital		2,061	85,755	49,539	137,355	
Total	12,847	186,475	326,283	277,469	803,074	2.08%
Trails						
Personnel	8,489	243,278	233,358	194,770	679,895	
M&S or Capital	3,825	818	148,071	15,784	168,498	
Total	12,314	244,096	381,429	210,554	848,393	2.19%
Community Visions						
Personnel	-	3,480	121,359	-	124,839	
M&S or Capital	-	-	-	-	-	
Total	-	3,480	121,359	-	124,839	0.32%
Total Program Spend	414,262	6,214,397	13,599,053	9,449,219	29,676,932	76.77%
Admin						
Personnel	100,692	555,696	591,933	413,776	1,662,097	
M&S or Capital or Transfer	402,467	990,481	2,934,472	1,784,236	6,111,656	
Personnel	10	330	395	-	735	
M&S or Capital or Transfer	309,359	27,344	544,812	324,286	1,205,801	
Total	812,528	1,573,851	4,071,612	2,522,299	8,980,290	23.23%
Total Bond Spend	1,226,790	7,788,248	17,670,665	11,971,518	38,657,221	
Administrative Spending as a % of Total Bond Spend	66.23%	20.21%	23.04%	21%		23.23%

	FY07 through FY21	FY22 YTD	Total Spend	Percent of All 2006 Bond Spend
Land Acquisition, Due Diligence and Stabilization				
Total	156,432,555	278,152	156,710,707	56.97%
Local Share				
Total	43,751,359	(2,716)	43,748,643	15.90%
Capital Grants				
Total	16,371,476	(212)	16,371,264	5.95%
Construction				
Total	31,191,964	118,414	31,310,378	11.38%
Total Program	247,747,354	393,638	248,140,992	90.20%
Admin				
Total	26,492,684	460,842	26,953,526	9.80%
Total Bond	274,240,038	854,480	275,094,518	
Administrative Spending as a % of Total Bond Spend	9.66%	53.93%		9.80%