



# A report from the Natural Areas and Capital Program Performance Oversight Committee

May 2023

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**Auditor**

Brian Evans

600 NE Grand Ave.

Portland, OR 97232-2736

503-797-1700

The 2019 parks and nature bond is a promise to build on the region's legacy to protect clean water, restore fish and wildlife habitat, and provide opportunities for people to connect with nature close to home. In 2019, the voters of the region chose to invest \$475 million to continue to protect clean water, restore fish and wildlife habitat and provide opportunities to connect with nature close to home across six program areas.



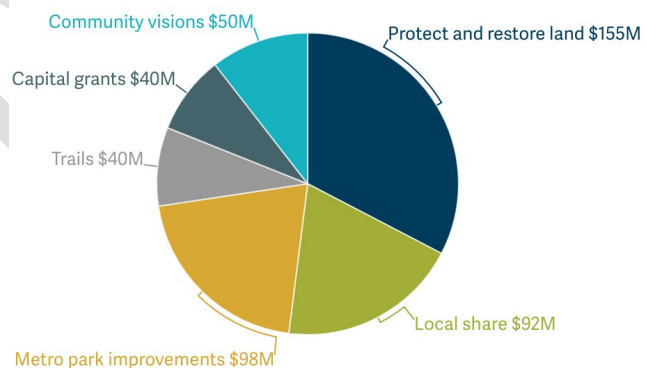
## INTRODUCTION

### Committee purpose

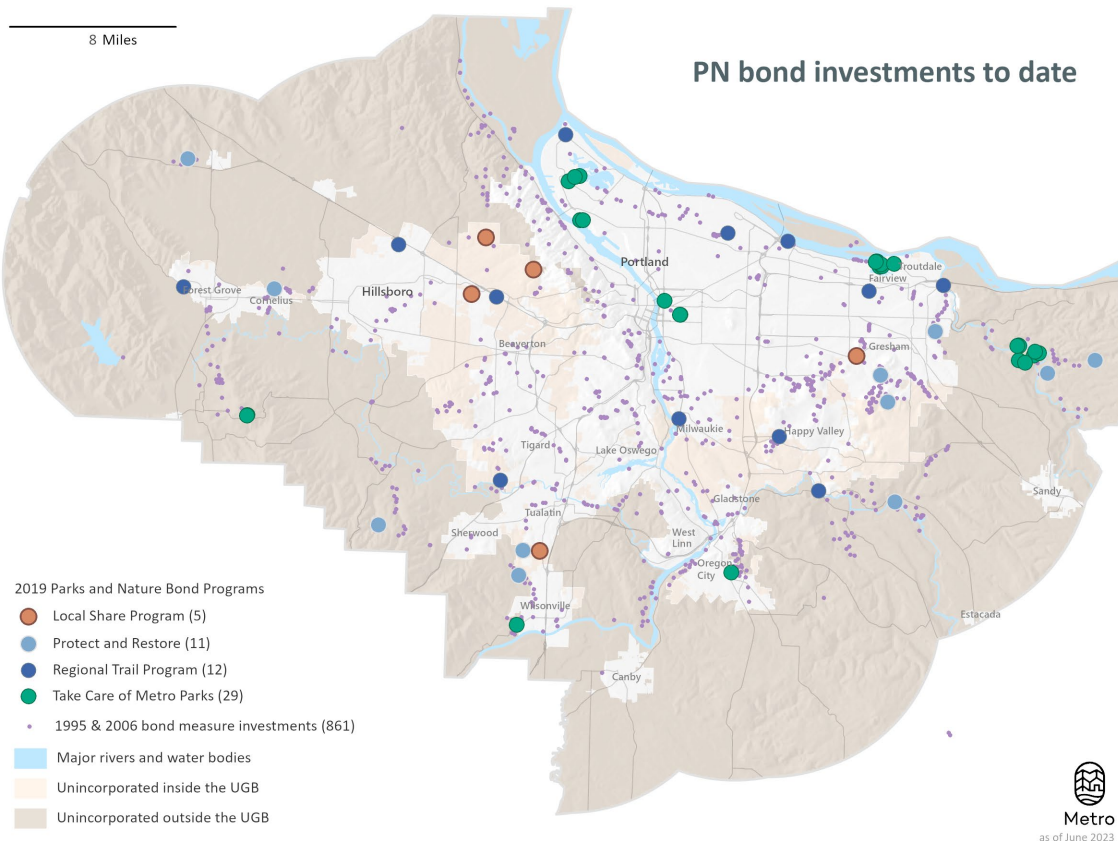
The 2019 parks and nature bond measure calls for creation of an independent oversight committee to provide review to Metro Council and community members of the 2019 parks and nature bond, the remainder of the 2006 natural areas bond, and capital investments from Metro's parks and nature five-year local option levy. The members of the Natural Areas and Capital Program Performance Oversight Committee believe that natural areas are integral to the wellbeing of everyone in the region are focused on determining and sharing progress made on the parks and nature bond in terms of management, expenditures and addressing the three bond criteria of racial equity, community engagement and climate resilience.

### Bond programs

The bond includes six programs. The funding levels were set by the legislation.



A pie chart showing the allotments for each of the 2019 parks and nature bond programs.



A sample snapshot of an online map tool showing the Metro region and projects currently funded by the 2019 parks and nature bond.

## What we found

The committee and Metro staff made progress in calendar year 2022 on reviewing and refining tools to report on and measure bond progress. The committee finds that staff has conducted the primary components of the bond work in a transparent and accountable way.

- All six bond programs are launched and advancing investments in the region. Bond investments are ramping up and bond programs anticipate even more activity, investment and spend in calendar year 2023 and beyond.
- Early reporting on community engagement activities, how land acquisitions to date align with factors that underpin climate resilience as well as efforts underway to increase accessibility at Metro sites and to ensure bond investments benefit businesses owned by and workers who are women and Black, Indigenous, and people of color demonstrates early progress on advancing the bond criteria.
- However, determining the impact of bond investments on advancing the bond criteria will take more time and a larger volume of bond investments to analyze.

**As bond investments continue to ramp up, the committee recommends staff focus on the following items this year and beyond:**

- Providing additional information about bond investments to the committee will allow the committee to better measure progress and underline impact
  - Maps of bond investments overlayed with relevant spatial data that feature opportunities for storytelling about individual investments and the entire portfolio of bond investments to date
  - Anticipated milestones for bond investments and spend by fiscal year
  - Information and frameworks used to evaluate each potential land acquisition opportunity for alignment with the bond's climate resilience criteria
  - Additional case studies of bond related community engagement activities
  - More interviews and surveys with partners and community members to understand the impact of bond investments and participating in community engagement activities
- Continuing to ensure information about bond programs and investments can be accessible by all members of the public should remain a high priority
- Exploring feasibility of more nuanced analysis on COBID (Oregon Certification Office for Business Inclusion and Diversity) participation for bond investments will allow for better understanding of current and potential economic impact of bond investments on firms and workers underrepresented in parks and nature and related industries.

**Process**

This report covers the committee's work through the end of calendar year 2022, which involved reviewing details of the six bond programs and case studies of the bond criteria in action and meeting regularly in working groups on land acquisition, community engagement and bond finance. The committee and staff worked together to refine the following tools to help track and assess progress of the 2019 Parks and Nature bond:

- Memo to Council and the committee for individual land acquisitions
- Template for staff to share additional information about land acquisition including properties acquired by target area and bond funds spent on stabilization activities
- Staff's development of a framework that connects land acquisition activities to the bond measure's climate resilience criteria and program criteria
- Staffs report on bond finance and COBID participation
- Initial map of bond investments completed to date
- Brief summaries of program status to date that will be accessible to the general public

The Committee also reviewed the following resources to prepare for the year 2 report back:

- Parks and Nature annual report for FY 2022
- The staff report on bond investments and activities for calendar year 2022
- Quarterly reports on bond progress to the committee



An adult holds hands and walks with two children down a trail at Newell Creek Nature Park, which was created with Metro bond funds.



Three adaptive mountain bikers stopped on a dirt trail to chat in Newell Creek Canyon Nature Park.

## LAND ACQUISITION

(placeholder for URL to full protect and restore land snapshot to be added as finals posted)

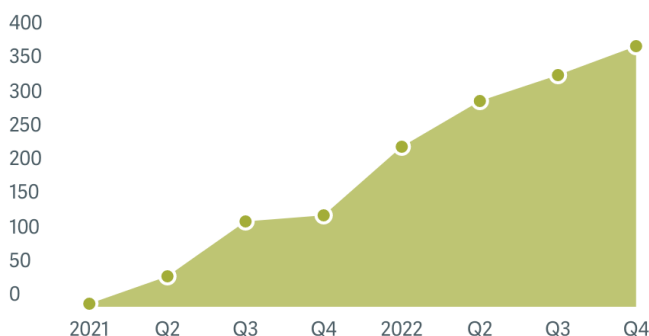
The protect and restore land program makes up a significant part of bond investments, spending and impact to date. The committee has reviewed how current land acquisition protocol builds on the foundation set by the 1995 and 2006 natural areas measures to protect over 15,000 acres of priority habitat through 500 individual transactions. The Metro Council approved [road maps for land acquisition across 24 target areas](#) in 2022 allows the team to complete real-estate strategies for each of the target areas, hire additional staff and begin to increase outreach to willing sellers around priority properties.

In calendar year 2022, Parks and Nature completed 5 acquisitions. From 2020 through December 2022, Parks and Nature completed a total of 11 acquisitions across 8 of the 24 target areas, spending a little over \$6 million on the properties. The properties acquired in calendar year 2022 are located in priority habitat across the region including the Clackamas River Greenway, Sandy River, Lower Tualatin Headwaters, Beaver Creek and Tonquin Oak

### Protect and restore land

This program buys high-priority natural areas and funds major restoration projects. The 1995 and 2006 bonds helped Metro purchase 15,000 acres of natural areas.

#### Acres protected

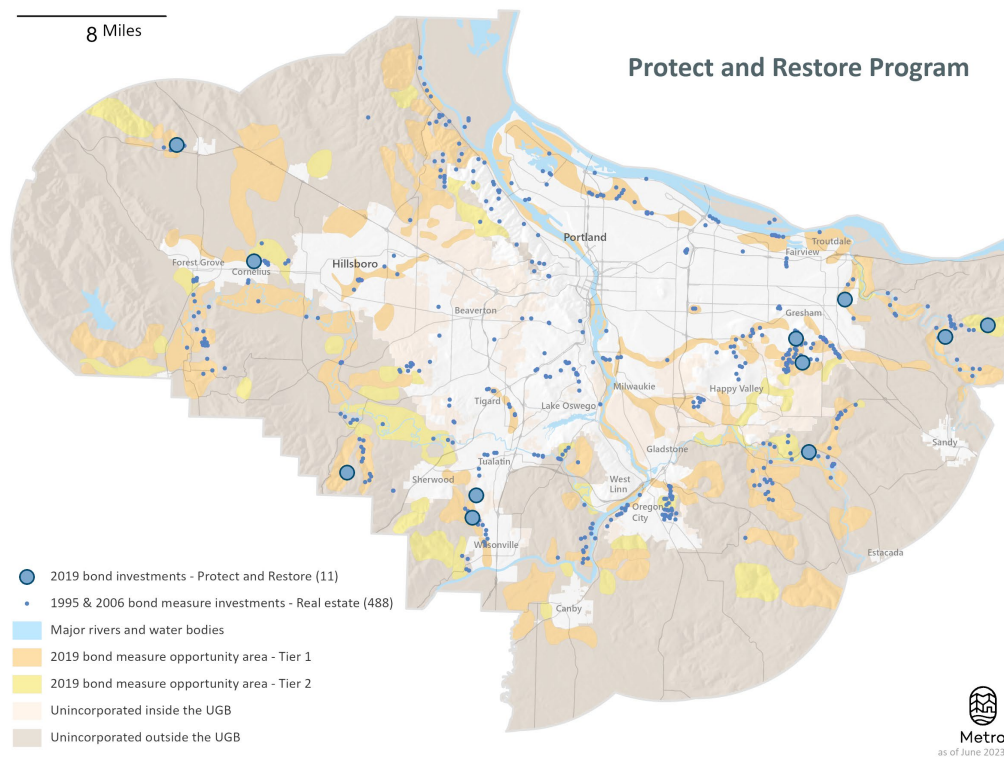


#### Properties purchased

11

Woodlands and were identified as priority or tier 1 acquisition opportunities.

As of December 2022, Parks and Nature has conducted outreach to over 100 landowners across the region to create a more robust pipeline of potential acquisition opportunities. The size of the pipeline helps expand the number of deals moving through each phase of negotiation towards completion, though the fact that this is a willing seller program, the fact that the most straightforward acquisition opportunities have been absorbed by previous bond measures and current market dynamics may all increase the amount of time it takes to fully ramp up the anticipated pace of acquisitions.



### From the committee:

We've reviewed how properties are targeted and evaluated for acquisition using information compiled in the memos to Council and the oversight committee summarizing how individual property purchases meet bond criteria and portfolio level evaluation of acquisitions to date. We find that the properties acquired as of December 2022 meet the bond goals and criteria, reflect community feedback and demonstrate alignment with key pillars of climate resilience including connectivity, anchor habitat and water quality and quantity.

Moving forward, the anticipated increase in the volume of land acquisitions will provide a more significant sample size to further to understand whether and how land acquisition activities advance priorities identified in the land acquisition road maps and align with goals for the 24 target areas. Updates on developing the land acquisition pipeline to understand progress in achieving balanced and responsive efforts across target areas.

We look forward to working with staff to review data used to evaluate potential acquisitions and continue to refine the information collected about each acquisition. The committee also looks forward to working with staff on strengthening tools to support evaluation of the entire land acquisition portfolio including mapping and spatial analysis to tell a stronger story about how land acquisitions increase habitat and wildlife connectivity and comparison with data collected from the 2006 natural areas bond.

## COMMUNITY ENGAGEMENT

(placeholder for URL to engagement 2-pager will be added when final documents posted)

When voters approved the 2019 parks and nature bond, they called on Metro to meaningfully engage communities of color, Indigenous communities, people with low income and other historically marginalized groups, and prioritize the projects and needs they identify. In this context, Metro has defined meaningful community engagement as providing community members who will be affected by a program or project opportunities to influence how they run and what they create. In pursuing bond related engagement activities, Parks and Nature continues to employ a community engagement approach that builds on feedback received to date, incorporate lessons learned from previous engagement activities and creates focused opportunities for BIPOC<sup>1</sup> communities to increase participation and continue to build trust.

The engagement activities completed in calendar year 2022, which range from BIPOC focused roundtables to online surveys translated into multiple languages and convening external committees to help shape grant solicitations, utilized strategies to build trust with communities and reduce existing barriers to increase engagement. In 2022, these activities and strategies helped shape the following bond program and project outcomes:

- The priority projects submitted as of December 2022 for local share funds reflect and have been shaped community feedback
- Metro Council approved land acquisition road maps include areas highlighted for protection by the community like the Johnson Creek watershed
- The solicitation for the bond funded trail grants was shaped by community, trails advocates and community feedback collected through an online survey ensured that the trail projects funded are important to community
- The Guidebook for the community choice grants pilot was shaped by the community choice grants program design and review committee made up of community members

The Parks and Nature bond measure's community engagement criteria directs Metro to prioritize community goals and needs during the development of the six bond program areas completed in 2022. With all six bond programs are launched, community engagement is focused on specific bond funded projects and will continue to evolve in future years.



<sup>1</sup> Abbreviation for Black, Indigenous, and people of color

### From the committee:

We believe that the type of meaningful community engagement defined by the parks and nature bond measure goes beyond counting who has been engaged to understanding who has been able to participate in engagement activities and what their feedback has helped shape. It also extends to the experience community members had in sharing their feedback to shape bond programs.

In our review, we've seen that Parks and Nature works to ensure community feedback is guiding bond programs and projects and to use engagement activities to build and strengthen relationships with community members over time. We appreciate Parks and Nature's ability to be thoughtful about incorporating best practices and lessons learned and being innovative in conducting engagement.

We've reviewed information about who and how Metro engages and how bond engagement has informed existing work. Reviewing specific examples of engagement for bond projects such as the community choice grants and upcoming engagement around the Blue Lake Park renovation project has helped us understand specific engagement strategies and tactics.

We encourage Parks and Nature staff to continue reflecting and identifying opportunities for improvement to meet this standard of meaningful engagement set by the bond measure. To do so, we encourage Parks and Nature to collect additional information from community engagement activities that speaks more to the expansive definition of meaningful engagement. Specifically, we encourage tracking whether community members are staying engaged through multiple projects and using post-engagement evaluation to understand the experiences of people and organizations with whom we have engaged as these opportunities will allow staff to continue to reflect on what engagement strategies and tactics have been most effective.

Finally, we believe that meaningful engagement includes ensuring that everyone can see themselves in Metro Parks and Nature spaces, engagement activities and materials. We appreciate learning about initial work underway to engage community members around accessibility improvements being piloted and planned at Metro sites and will look to hear more about those efforts. We also review Parks and Nature materials summarizing efforts on the bond measure with a close eye towards ensuring the maps, photos and written information is accessible as possible.



## FINANCE

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

As of May 2023, Metro has spent \$42 million of bond proceeds available and has awarded \$24.8 million through trail grants and local share. The current administrative rate is about 23 percent of total bond spending to date.

As part of efforts to better understand the needs of administering this type of bond, the committee has discussed with staff the reasons and dynamics behind the current administrative rate, which covers a portion of overhead expenditures that cannot be tied directly to an action related to the bond's capital investments. Some of these services include, but are not limited to, legal costs and financial support that do not correspond directly to a single project, but provide are essential to delivering on the bond's objectives and outcomes.

As bond funded investments in parks, trails and natural areas increase due to building pipeline through steady landowner outreach in 2022 and a ramp up of construction projects at Blue Lake Park, the portion of overall bond spend that is used for capital outlays in relation to indirect costs will increase, which should impact the administrative rate over time.

In addition, as of May 2023, the COBID participation rate across all bond investments is 38 percent, well over the floor of 20 percent, a goal set for both prime and sub-contractors. The rate of COBID participation for the current fiscal year tracks closely to the COBID participation rate from the previous fiscal year.



A young child runs along a trail at Chehalem Ridge Nature Park.

### From the committee:

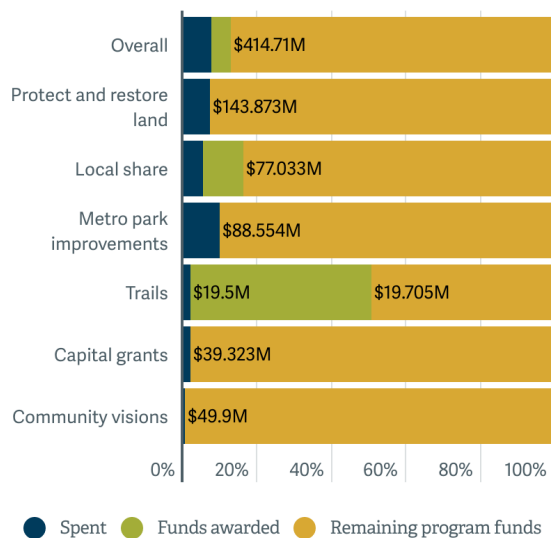
As a committee and finance working group, we care that bond money is being spent and also how the money is spent. This bond measure is focused on goals around outreach and engagement and we believe it's important for us as a committee to work with Metro to break down spending in relation to how much is spent to support each of the goals.

We as a committee have had conversations with Metro staff and we feel that the bond spend to date and anticipated spend is in line with bond goals. We understand that administrative cost is based on the pace of overall bond spending. The committee will continue to ask staff for detailed explanations and broader context about overall spend as well as trendlines quarter to quarter and year over year. We find Metro's administrative expenditures to be acceptable in light resources required to staff and manage a measure of this size and complexity and the expectation that the administrative spend will diminish as a percentage of overall bond spending moving forward.

We appreciate the current COBID participation rate in light of the floor established for the bond measure and information shared to date by staff. We recommend that in 2023 and beyond, staff explore the feasibility of disaggregating participation rates by type of contractor as the first step towards building a better understanding of the impact of bond investments on specific communities as well as the feasibility of analyzing COBID participation rates for both prime and sub-contractors on bond funded projects.

## Bond spending

\$60.3 million had been spent or awarded to projects by December 31. Administrative costs accounted for 24% of spending. This share of costs is expected to drop quickly as bond programs ramp up spending.



Two deer graze in the oak savanna at Graham Oaks Nature Park.

## LOOKING TO THE YEAR AHEAD

In the coming year, the committee anticipates being able to review additional information and tools that add nuance towards understanding of progress. As the continued ramp up of land acquisition activities due to building a pipeline through steady landowner outreach in 2022, construction projects at Blue Lake Park ramp up in fall of 2023 and 2024 and more local share and grant awards request funding through reimbursements, the committee anticipates having more projects and program progress to review and evaluate.

To date, the committee has identified additional topics to review in 2023 and beyond as a full committee or through working groups:

- Build on initial mapping to further analyze bond investments as connected systems and measure progress on advancing accessibility and climate resilience through parks, trails and natural areas across the region
- Review information on Metro's tribal government engagement related to the parks and nature bond
- Conduct an analysis acquisitions from 2006 bond to understand how 2019 acquisitions are comparing especially on climate resilience factors
- Review evaluation of ongoing bond related community engagement processes and projects

## 2022 OVERSIGHT COMMITTEE MEMBERS

Burt Edwards, Co-chair	Director of Programs, ReThink Media
Cary Waters, Co-chair	Contract Equity Manager, Portland Bureau of Transportation
Lisa Freedman <sup>2</sup>	Former US Forest Service Executive and Budgeting Director
Tana Atchley Culbertson	Co-Director, Willamette River Network
John Ferguson	Former geotechnical engineer
Shantae Johnson	Owner, Mudbone Grown LLC
Michelle Lin	Strategist, Oregon Food Bank
Martita Meier	Digital strategist and project manager, Nike
PK Melethil	Environmental Scientist, TCM physician
Bryan Mercier <sup>2</sup>	NW Regional Director, Bureau of Indian Affairs
Georgena Moran	Accessibility specialist, ACCESS recreation
Tabitha Palmer DuPrau	Underwriting Counsel, Fidelity National Title Group
Vivek Shandas	Professor, Portland State University
Shannon Shoul	Director, Procurement Sustainability, Nike
Erin Upton	Environmental social scientist and landscape architect
Owen Wozniak	Land Transactions Program Manager, the Land Trust Alliance

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<sup>2</sup> Former committee co-chair through fall 2022

<sup>2</sup> Former committee member through winter 2023

## Summary of feedback and direction from Natural Areas oversight committee on year 2 report materials, May 2023

### The year 2 report includes two components

1. Staff report on bond investments and activities up to December 2022 including the following sections
  - [Protect and restore land program snapshot](#)
  - [Local share program snapshot](#)
  - [Walking and biking trails program snapshot](#)
  - [Nature in Neighborhoods capital grants program snapshot](#)
  - [Take care of Metro parks program snapshot](#)
  - [Large scale community visions program snapshot](#)
  - [Bond criteria snapshot](#)
  - [Bond finance snapshot](#)
  - [Appendices](#)
2. Committee report back to Council including summary information in staff report

**The Natural Areas Oversight Committee reviewed and shaped both elements of the year 2 report materials in the following ways:**

**February 2023:** Memmbers discussed overall approach to developing year two report, identified principles and priorities for report development

**April 2023:** members reviewed elements of the year 2 staff report, shared feedback, questions and edits. at full committee meeting and working groups

**May 2023:** Members reviewed and helped shape year 2 committee report back and final year 2 staff report materials

### February 2023 working group meetings on bond finance, land acquisition and community engagement

Comments, edit or question	How it's incorporated
Where possible, share how individuals are being engaged from bond program to program and whether that's an intentional goal of the engagement	Table 2 on community engagement activities, page 7 in appendix
Share feedback collected so far from individuals participating in bond engagement	Community engagement summary in year 2 staff report bond criteria snapshot (page 2)
Provide additional context about how we expect the pace of expenditures to change and how that will impact administrative rates	Finance section of the committee report back (page 6-7)
Important to make value of cost of operating and implementing the bond known to the public.	Finance section of committee report back
Future opportunities to look at COBID reporting by disaggregation	Finance section of committee report back, page 6

Important to measure success towards climate criteria quantitatively and qualitatively	Graphs in protect and restore land snapshot (page 5) and bond criteria snapshot (pages 6-7)
Include context about how this bond measure builds on 1995 and 2006 bond measures in communications materials (annual report and others)	Introductory language in protect and restore land snapshot, page 1
More information on how all bond programs address the three bond criteria	Detailed tables in appendix, page 4-6, 13-15
Share mapping of all bond investments	Maps in committee report back and program snapshots

### **February 2023 full committee meeting**

<b>Comments, edit or question</b>	<b>How it's incorporated</b>
Voice of report back should be committee's, informed by staff's work	Overall approach to development of committee report back
Incorporating executive summaries and 2-pagers where possible	Development of program specific snapshots that make up the year 2 staff report
Use infographics and visuals and maps in the year 2 report	Infographics from online bond dashboard, pictures and maps incorporated through committee report back and staff report
Articulate mile markers for progress to date across bond spend, land acquisition and engagement	Highlighted as a recommendation in the committee's report back, page 2
Look at bond criteria across programs, not just by working groups	Bond criteria snapshot in staff report for year 2 is organized by criteria and detailed tables 1, 2 and 3 in appendix
Ensure there is more descriptive information about community engagement activities to date beyond how many people have been engaged	Bond criteria snapshot in year 2 report, page 2 provides more detail and description about community engagement activities including who is engaged and how; detailed tables 1 and 2 in the appendix
Ensure climate resilience is a focus including sharing how land acquisitions address the bond's climate resilience criteria	Graphs in protect and restore land snapshot, page 5 and bond criteria snapshot, pages 6-7

### **April 2023 working group meetings and emails**

#### *Format of year 2 report materials*

<b>Comments, edit or question</b>	<b>How it's incorporated</b>
Update formatting of the community engagement flow chart	Bond criteria snapshot, figure 1, page 2
Aim for 70 percent color contrast in bond investments map	Updated colors of maps
Turn passive voice into active voice	Edits across year 2 report materials
Minimize text to make it more manageable for reader app	

Provide a clearer and more explicit list of the bond criteria	Pages 1 and 5-6 of the bond criteria snapshot in the year 2 staff report
Add hyperlinks to different sections of the report so people can navigate more easily	In progress, need to update once all materials have public facing links
Put more detailed tables and resource list at the end of the report in the appendix	Detailed tables in appendix

### *Content of year 2 report materials*

<b>Comments, edit or question</b>	<b>How it's incorporated</b>
Be more explicit about addressing what the staff feels as what meaningful engagement has been	More descriptive language included in community engagement section in bond criteria snapshot (page 2-3) and committee report back (page 4)
Need more context on dollars spent and perhaps a list of properties acquired.	Protect and restore land snapshot lists all properties acquired as of December 2022, page 5
Add how many acres purchased through 500 transactions	Language in protect and restore land program snapshot, page 1
More clearly identify the strategic importance of each land acquisition (by climate resilience criteria, habitat or tier 1/tier2)	Protect and restore land snapshot includes graphs of acquisitions meeting climate resilience criteria, page 3
Show progress by target area on acquisitions to date with context of previous bond measures	Protect and restore land snapshot includes table of acquisitions by target area, page 4
change "COBID spending" header title to "Contract Equity", and consider using the term "participation" instead of "utilization"	Updated language in bond finance snapshot, page 3
Clarify money spent vs. money awarded through executed Intergovernmental agreements	Language in bond finance snapshot, page 1
Pull out multiple certification types for deeper analysis of COBID participation	Highlighted as recommendation in committee report back, page 2
Add information about goals and actuals around landowner outreach understanding current market conditions and a snapshot of whether acquisition program fully up and running	Language about landowner outreach in land acquisition section of committee report back, page 5
Provide additional context about how climate resilience is showing up for this bond measure versus the 2006 natural areas bond.	Recommendation highlighted in the committee report back, page 2
Begin development on a story map in which each acquisition gets a 1-2 page story showing how they met bond criteria for public access	Recommendation highlighted in the committee report back, page 2
Helpful to have criteria summary include a case study snapshot on engagement.	Community engagement section in bond criteria snapshot in year 2 staff report page 3

### April 25 2023 full committee meeting

<b>Comments, edit or question</b>	<b>How it's incorporated</b>
Provide public context on how the land acquisition process is going, understanding that more judgment can be made with more transactions to come.	Land acquisition section of committee report back, page 3-4
Metro to underscore and define meaningful engagement, community impact	Included meaningful engagement definition in community engagement section of report back and bond criteria snapshot
In material development, consider people with different abilities, for example blind people navigating a map	

### **May 2023 committee meetings and emails**

<b>Comments, edit or question</b>	<b>How it's incorporated</b>
Add photos on where possible for visual aid.	Photos included in committee report back
Include infographics from online bond dashboard in the report materials	Committee report back includes infographics
Include descriptions of images and multiple formats so it doesn't show only as an image which visually impaired readers cannot see.	Incorporated alt text for each picture and image in report back
Include former members who served during 2022	Updated list of committee members in committee report back, page 7
Provide additional clarity about administrative rate and overhead cost for bond and describe value, including a brief definition of what the overhead is.	Added language to finance section of committee report back, page 6
Working group is comfortable with the administrative rate, it is appropriate it is a fluid time based on acquisitions	Included in finance section of committee report back, page 6
Revise statement on protect and restore snapshot that says the low hanging acquisition opportunities have been absorbed by previous measures	Updated intro language on protect and restore land snapshot and land acquisition section of committee report back (page 4)
Does 20 percent COBID floor for the bond include apply to both sub-contractors and contractors?	Updated language on bond finance snapshot, page 6



# 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.

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**Auditor**

Brian Evans

600 NE Grand Ave.

Portland, OR 97232-2736

503-797-1700

**Date:** May 2023

**To:** Natural Areas and Capital Program Performance Oversight Committee

**Re:** Staff report on bond work in calendar year 2022

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

## **BACKGROUND ON METRO PARKS AND NATURE VOTER APPROVED INVESTMENTS**

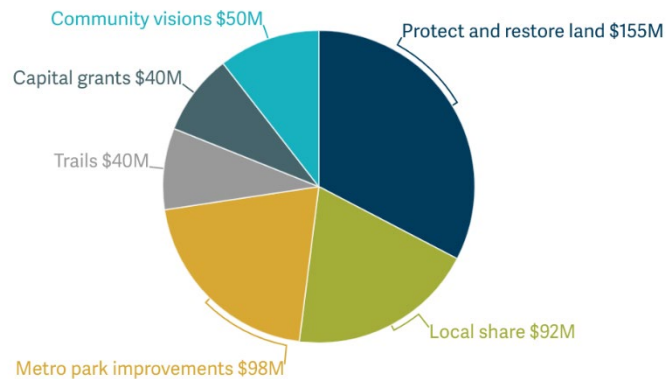
For more than two decades, voters have repeatedly trusted Metro to protect clean water, restore fish and wildlife habitat and provide opportunities for people to connect with nature close to home through the passage of three capital bond measures and two local option levies.

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.

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

## Bond programs

The bond includes six programs. The funding levels were set by the legislation.



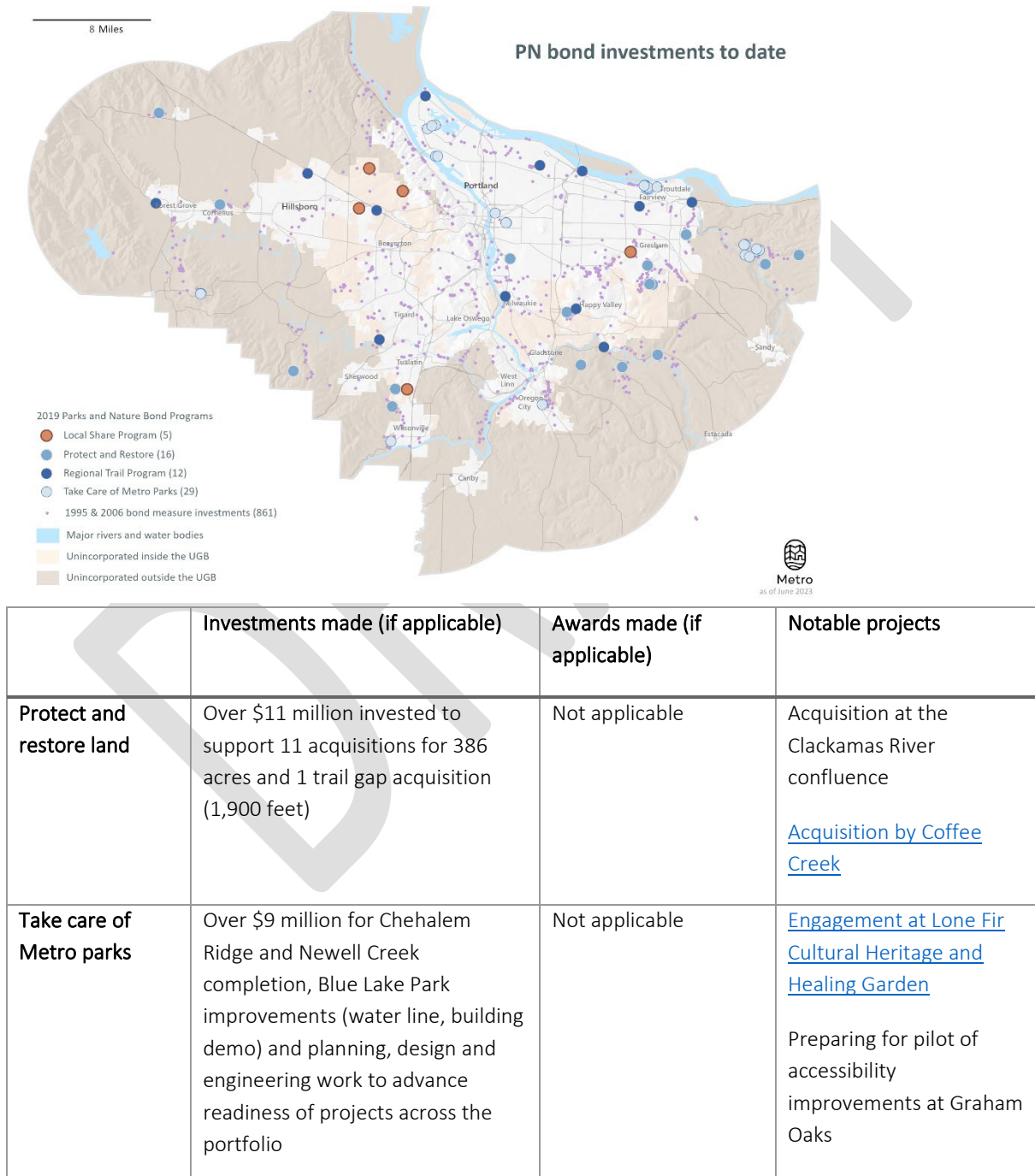
## OVERVIEW OF KEY THEMES RELATED TO BOND PROGRESS IN 2022

- 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.
- Staff are continuing to utilize and employ innovative community engagement approaches to bond projects and to support local park providers in doing the same.
- The Natural Areas Oversight Committee and Metro staff made significant progress 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.
- In the coming year and beyond, staff will be able to provide to the Natural Areas Oversight Committee more information, reporting and mechanisms through which the committee can determine progress towards bond spend and bond program goals.
- Development of tools and frameworks to help evaluate the impact of bond investments on strengthening the region's climate resilience, advancing racial equity and whether and how they've been shaped by meaningful community engagement.

## SUMMARY OF INVESTMENTS MADE TO DATE AS OF DECEMBER 2022

The following is a snapshot of 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](#)

Figure 1, map of 2019 parks and nature bond investments and awards completed as of December 2022



			<a href="#">Key infrastructure investments at Blue Lake Park</a>
<b>Local share</b>	\$4 million in local share funds invested to help City of Gresham and Tualatin complete acquisitions	\$5.3 million awarded to THPRD for three projects	<a href="#">Gresham acquisition of site next to SW Community park</a>  <a href="#">Tualatin's acquisition of natural areas in Basalt Creek</a>
<b>Trails for walking and biking</b>		\$19.5 million to trail planning and construction projects across the region	<a href="#">Full list of awards here</a>

## 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 <a href="#">Metro's construction career pathways</a> project and the <a href="#">Regional Workforce Labor Agreement</a> ?	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>

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**Program description:** The protect and restore land program 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 over 500 individual transactions resulting in over 15,000 acres of protected habitat. This means the most straightforward land acquisitions has been completed and most of the transactions funded by the 2019 bond will be more complicated from a land use or process perspective.

This program will also invest up to \$10 million of Create Trails for Walking and Biking to buy land where park providers will one day build regional trail connections.

### Key milestones completed in calendar year 2022

- [Council approved land acquisition road maps](#) in April 2022 articulate strategic priorities and goals for land acquisition
- Real estate staff hired in early fall 2022
- Real estate strategies for each target area developed to further identify targets for priority acquisitions finalized in 2022
- Developing measures of success for land acquisitions, especially related to the bond measure's climate resilience criteria
- Refining reporting on land acquisition activities to the Natural Areas Oversight Committee including updating memos to Council and the oversight committee summarizing how individual property purchases meet bond goals and criteria
- Outreach to over 100 landowners about acquisition opportunities

Due to the milestones completed described above, the protect and restore land program is ramping up and has built the tools needed to effectively and efficiently conduct land acquisition through a willing seller program. The anticipated addition of two additional real estate negotiators to the team, making it a team of four, along with the expansion and maturation of the acquisition pipeline, will allow staff to be at relatively full capacity as of fall 2023. While the size of the pipeline helps expand the number of deals moving through each phase of negotiation towards completion, the fact that this is a willing seller program, that the low-hanging acquisition opportunities have been absorbed by previous measures and the reality of current market dynamics may all increase the amount of time it takes to fully ramp up the anticipated pace of acquisitions.

### **Milestones complete (by the numbers) during calendar year 2022**

Category	During calendar year 2022
Number of acquisitions made	5
Acres purchased	115
Total trail gap feet purchased	0 feet
Number of landowners contacted by Metro staff (including some we have existed conversations with and some who are new)	100
Number of real estate strategies completed for each of 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 (status below as of December 2022)
- Number of trail gaps secured across the region
- Number acquisitions focusing on key habitat types
- Number of acquisitions focusing on primary climate resilience strategies
- Bond criteria met by acquisitions

Figure 1

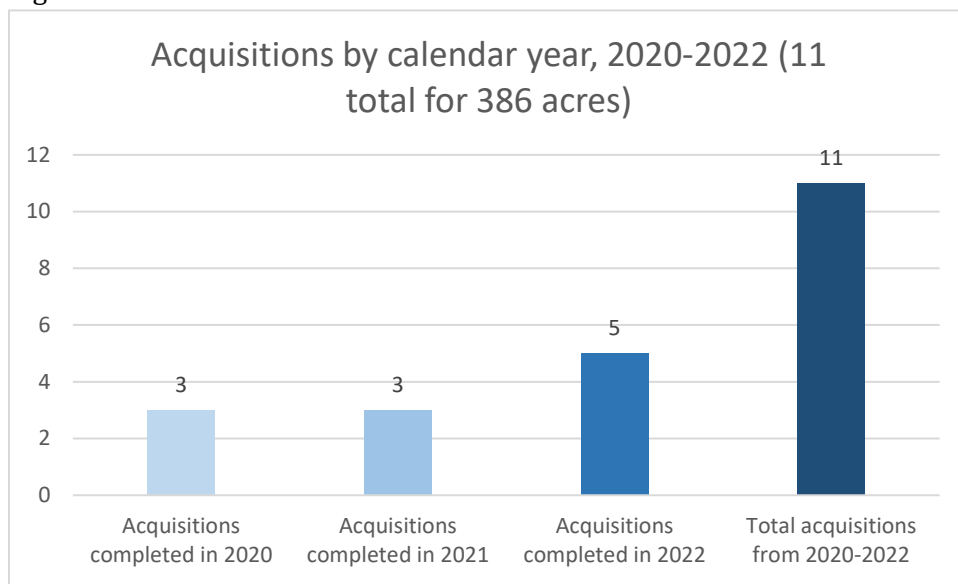
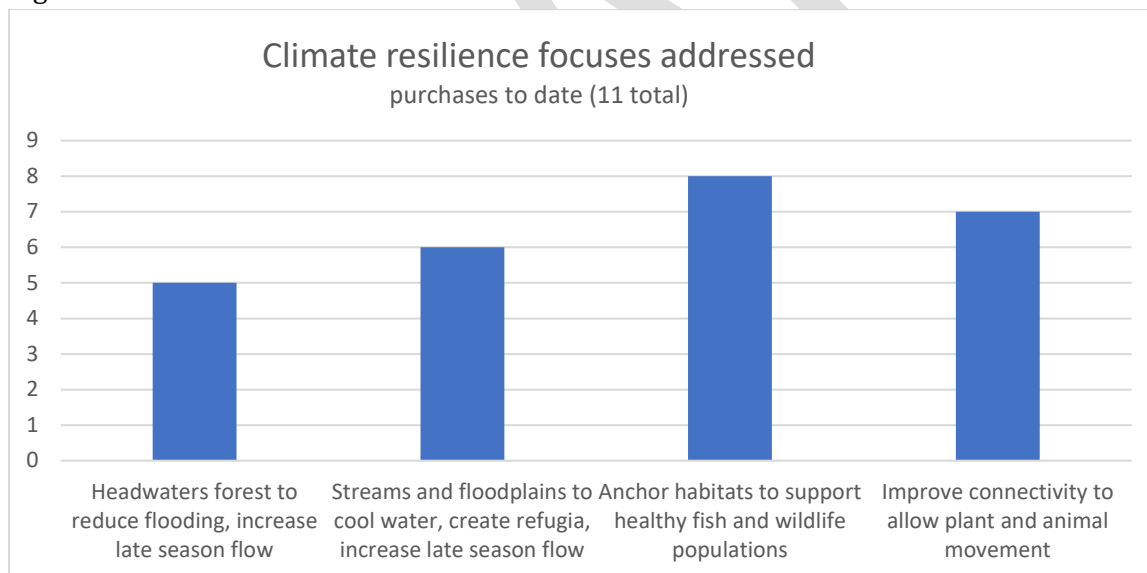
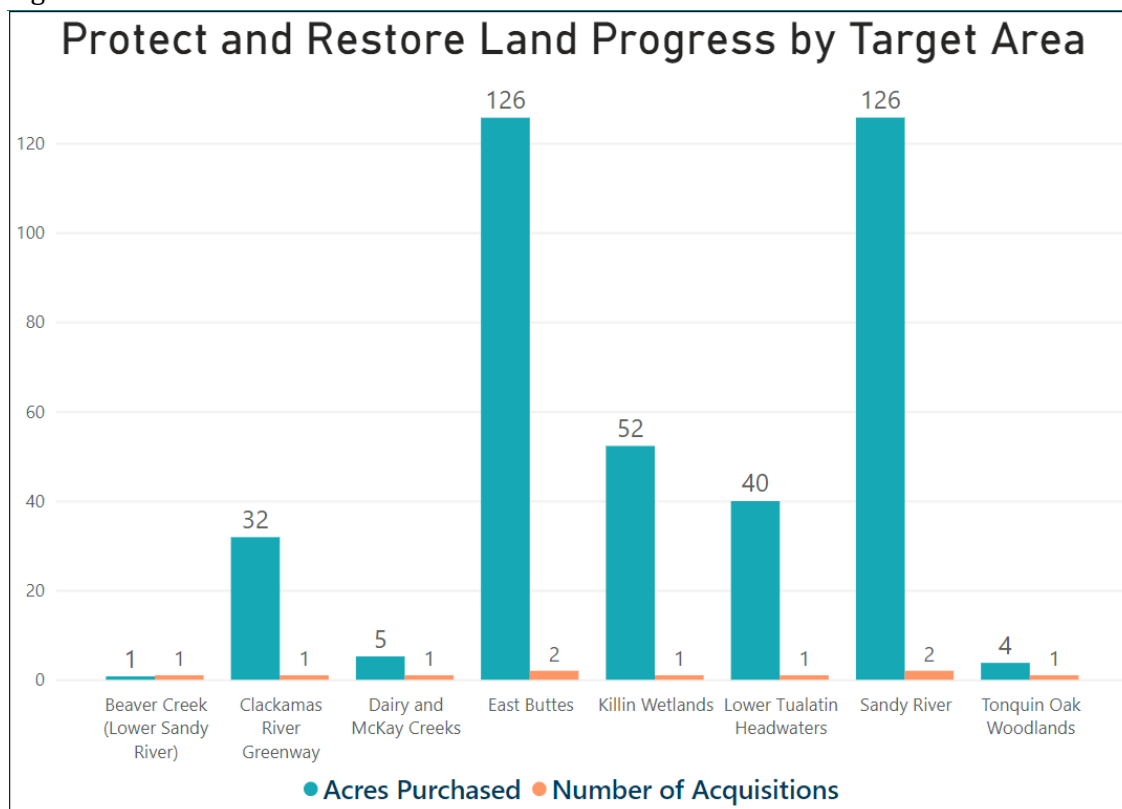


Figure 2



Note: we will need to update this chart for the final version of this report. There should only be 10 purchases reflected (the 11th is a trail purchase)

Figure 3

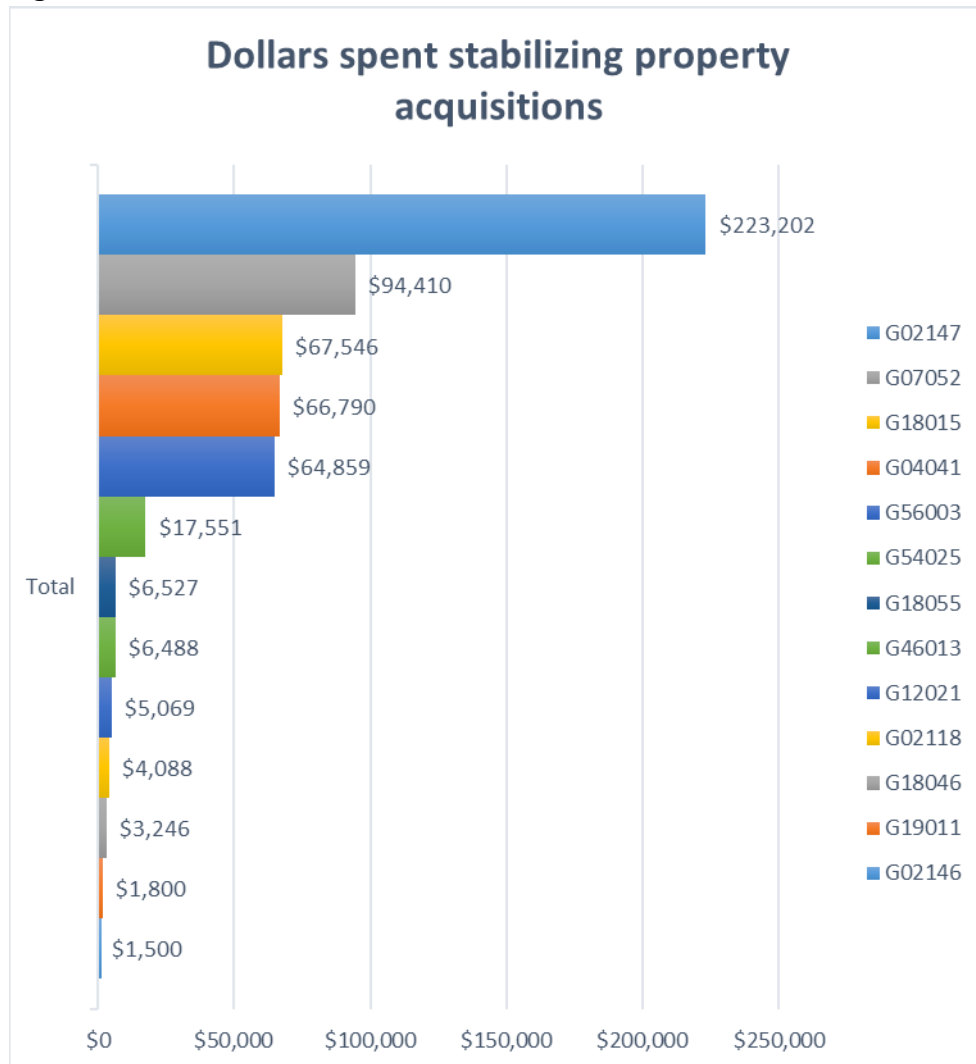


### Stabilization activities

Each property acquired through the protect and restore land 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 including the 11 properties acquired with the 2019 parks and nature bond. The other two stabilization projects were for properties acquired with the 2006 natural areas bond.

During stabilization Metro uses bond funds to address threats that would otherwise compromise the values for which a new natural area is acquired. Metro focuses on actions that protect high ecological function and shift currently degrading conditions to a positive trend leading to Metro to meeting the conservation objectives for which the property was purchased. Common stabilization actions include natural resource enhancement and property management and security actions. Important ecological functions addressed include key features such as: soil erosion control, habitat quality and trend, temperature and flow modification of streams, and public safety.

Figure 4



#### ALL PROPERTIES ACQUIRED AS OF DECEMBER 2022

Target Area	Close Date	Acres	Purchase Price
Ice Age Tonquin Trail 2019 (22-5250)	06/29/2020	0.88	\$113,500.00
Sandy River 2019 (22-5250)	09/08/2020	86.76	\$350,000.00
East Buttes 2019 (22-5250)	12/08/2020	8.59	\$340,000.00
Dairy and McKay Creeks 2019 (22-5250)	02/10/2021	5.21	\$9,000.00
Killin Wetlands 2019 (22-5250)	11/24/2021	52.28	\$465,000.00
East Buttes 2019 (22-5250)	12/09/2021	117.09	\$1,422,000.00
Clackamas River Greenway 2019 (22-5250)	01/26/2022	31.88	\$1,681,485.00
Sandy River 2019 (22-5250)	05/12/2022	38.95	\$75,000.00
Lower Tualatin Headwaters 2019 (22-5250)	08/08/2022	39.95	\$1,000,000.00
Beaver Creek (Lower Sandy River) 2019 (22-5250)	10/06/2022	0.75	\$475,000.00
Tonquin Oak Woodlands 2019 (22-5250)	11/30/2022	3.77	\$110,000.00

## LOCAL SHARE

**\$92 million** allocated to local governments for park improvement projects and locally important acquisitions, [www.oregonmetro.gov/localshare](http://www.oregonmetro.gov/localshare)

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### Local share program description

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

Once park providers submit a project, Metro staff review and approve it and the two governments negotiate an agreement that governs the disbursement of local share funding.

### Local share milestones completed as of 2022

The local share team is working to support park providers of all sizes to identify projects that meet bond criteria and community priorities including the following projects:

- Awarded \$10.3 million in funds to 5 projects including the City of Gresham for acquisition of a [parcel adjacent to Southwest Community Park](#), the City of Tualatin for [acquisition of a parcel near Basalt Creek](#) and Tualatin Hills Park and Recreation for [three projects that retrofit and expand access to nature across the district](#)

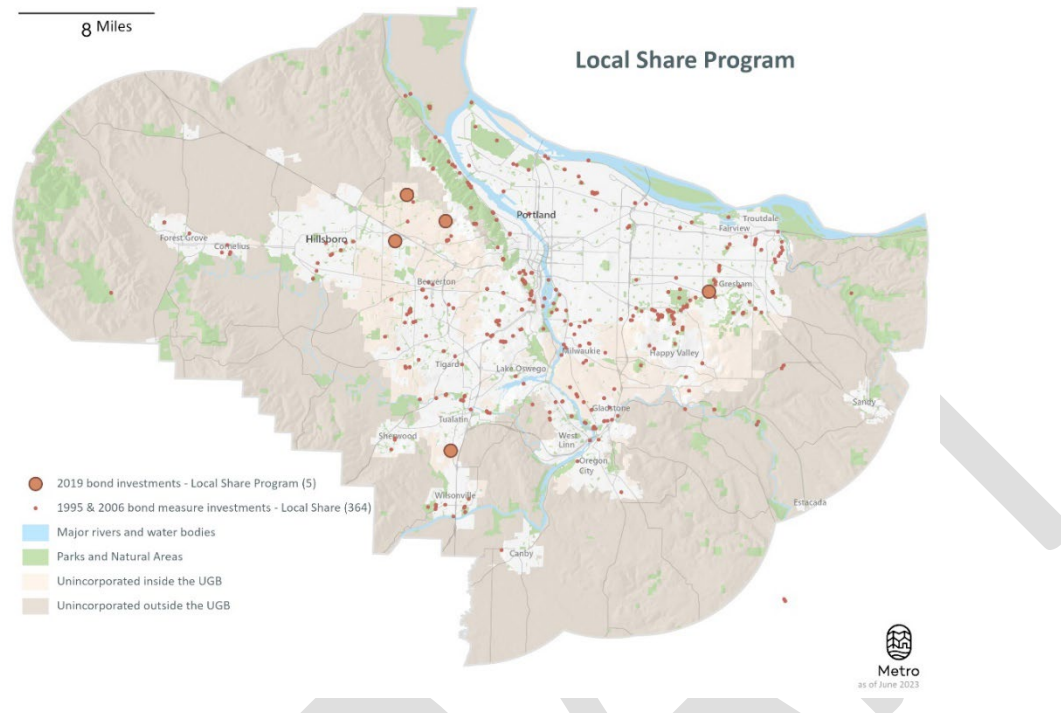
- Submission of 7 additional projects for review and intergovernmental agreement execution

- 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.

Category	During calendar year 2022
Number of projects awarded funds	4
Number of executed IGAs with park providers	2
Number of projects submitted but not yet awarded funds	7 (PPR, Wilsonville and Forest Grove)
Dollars awarded through executed IGAs	\$6.8 million
Dollars spent through completed projects	\$1.5 million
Contacts with park providers to support in the project submittal process	20-plus
Number of roundtables to support learning on bond criteria	2 (community engagement and accessibility), 8 total since 2021 on tribal government engagement, workforce and contract equity, anti-displacement, community engagement)

- Interviewed 24 representatives and surveyed 9 representatives from the region's park providers on experience of participating in program to date.

**Figure 1, map of local share project awards as of December 2022**



### 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 reviewed projects submitted by Portland Parks and Recreation, Forest Grove and Wilsonville and preparing to finalize intergovernmental agreements to formalize funding awards for seven projects. The team will continue to identify resources and strategies as well as findings from interviews and surveys of park providers 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 anticipates that the pace of local share project submittal will increase. As additional park providers submit priority projects, the team will work with park providers to capture and report on progress made in 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
- Total number of executed intergovernmental agreements finalized for approved projects
- Map of location and type of local share projects that have been awarded bond funds to date
- Reporting from park providers on how they're advancing bond criteria in project selection, development and activation, which will begin in summer of 2024
- Interviews and surveys of park provider staff to understand the impact of advancing local share projects and implementing bond criteria is

## WALKING AND BIKING TRAILS

**\$40 million** for building out the regional trails network, [oregonmetro.gov/regional-trails-and-greenways-system](https://oregonmetro.gov/regional-trails-and-greenways-system)

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**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 of trail gaps where park providers will one day build regional trails from willing sellers and roughly \$20 million for competitive grants to local governments to plan, design and build regional trails.

### Walking and biking trail milestones completed as of 2022

- Developed solicitation process for the competitive trail grants in 2021.
- Solicitation process was 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.
- convened a working group of park provider representatives and community members to help design the solicitation and evaluation process for trail grants.
- In spring 2022, conducted online survey on potential trail projects translated into five languages and elicited 1500 unique responses.
- 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.

### Walking and Biking trails milestones completed in 2022 (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

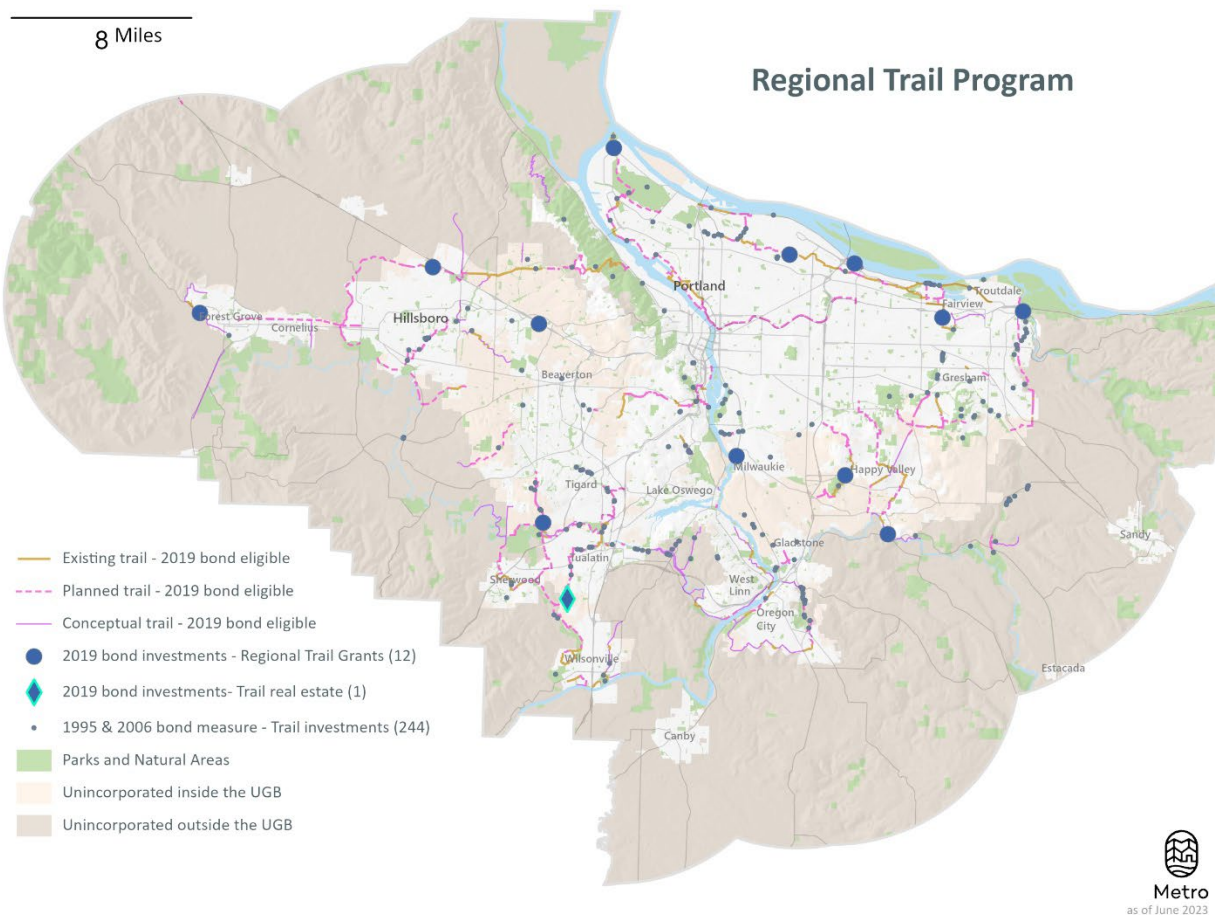
### Looking ahead

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)

**Figure 1, map of walking and biking trail investments and awards as of December 2022**



## 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>

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**Nature in Neighborhoods capital grants program description:** The Nature in Neighborhoods Capital Grants program supports 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. 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.

The capital grants program from the 2006 natural areas bond 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.

To date, this program also includes the [Community Choice grants](#), which will use a participatory process to recommend up to \$2 million in grant funding to Metro Council to invest in projects selected by the community and that benefit BIPOC and other historically marginalized communities.

### **Nature in Neighborhoods capital grants milestones completed as of December 2022**

- Parks and Nature staff created the program design and review committee of community members to advise on the development of the solicitation guidebook for the community choice grants pilot round. In 2021, staff conducted a broad recruitment for committee members, resulting in 44 applications.
- In winter 2022, 6 individuals were chosen to be on the program design and review committee, which met 16 times since winter of 2022 to help shape the community choice grants guidebook for project solicitation.
- In fall 2022, xx many new members joined the committee.
- Completion of the community choice grants guidebook for solicitation
- Hired a community engagement team to help develop community choice grants pilot activities with a focus on 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).
- Staff also worked to develop a plan to conduct an initial round of the pilot in Metro Council District 4 or Western Washington County and began meeting with park providers in district 4.

### Nature in Neighborhoods capital grants milestones completed in 2022 (by the numbers)

Category	During calendar year 2022
Number of community members participated on the program design and review committee	11
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 for Metro Council consideration anticipated in summer 2023. 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 Nature in Neighborhoods Community Choice Grants officially launched in March 2023 with information sessions and idea collection events.

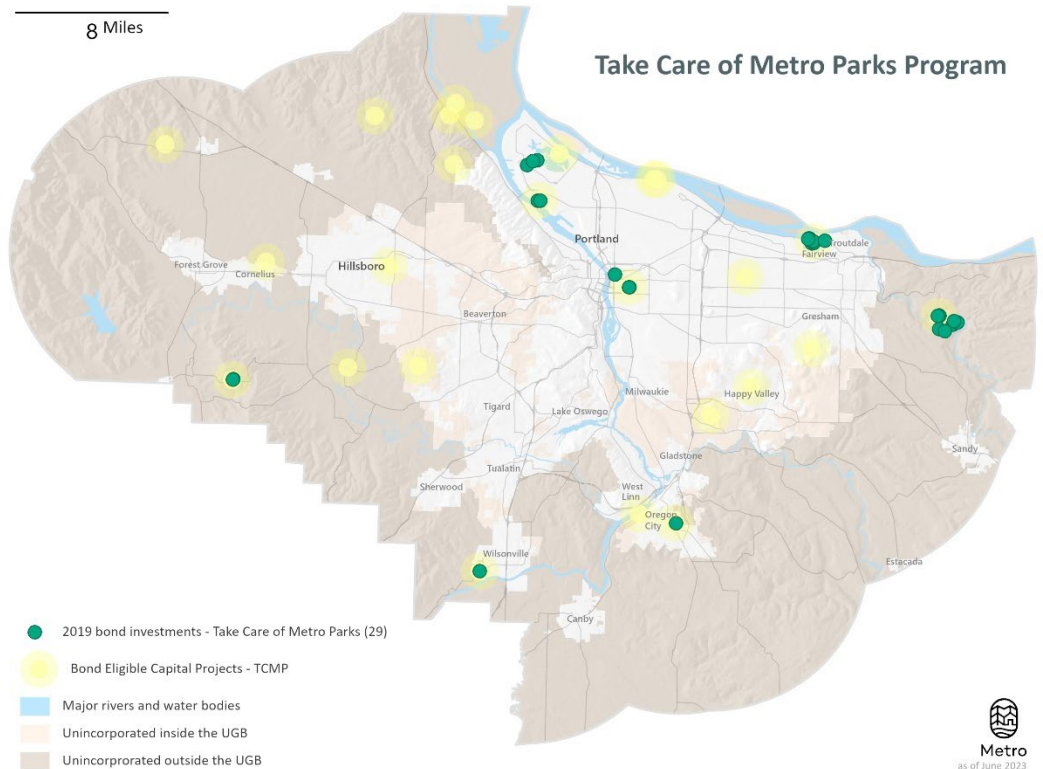
## TAKE CARE OF METRO PARKS

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

**Take Care of Metro Parks program description:** Metro's regional parks, boat launches and cemeteries welcome visitors each 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.

Since 2020, the take care of Metro parks program has spent over \$9 million to complete projects that advance capital improvements at Blue Lake, Oxbow, Lone Fir, helped to complete Newell Creek Canyon and Chehalem Ridge and is pioneering some of Metro's most recent policy commitments around accessibility, sustainability and workforce equity.

Figure 1, map of Take Care of Metro parks projects, as of December 2022



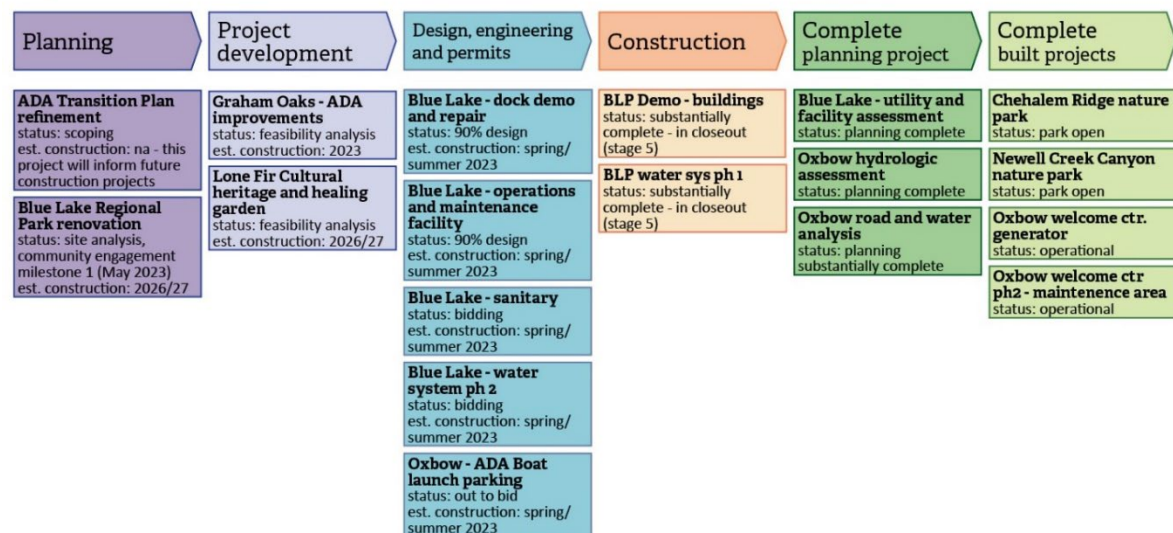
### Take Care of Metro Parks milestones completed as of December 2022:

- Completed Chehalem Ridge and Newell Creek Canyon nature parks.
- Completed Oxbow Hydrologic study, Oxbow Welcome Center Phase two Maintenance Area Improvements, Oxbow Welcome Center Generator.
- Continued progress on addressing health, safety and accessibility improvements at Blue Lake and Oxbow.
  - At Blue Lake Regional Park, construction for the first phase of utility improvements and removal of defunct buildings was completed.

- At Oxbow Regional Park, the Oxbow Potable Water and Road Analysis project developed a construction work plan for repair of the aging potable water system and road to correct drainage and asphalt shifting.
- Progress on implementing ADA accessibility improvements
  - Work to increase ADA parking at the Oxbow boat launch is kicking off with the creation of two accessible parking spaces.
  - Planning for ADA accessibility pilot at Graham Oaks Nature Park to support the removal of barriers to access in accordance with the Parks and Nature ADA Transition Plan.
- Lone Fir Cemetery: Design and cultural resource consultants hired and engagement underway for the Cultural Heritage and Healing Garden
- A contract for the Blue Lake Park Curry Building project became the first at Metro to implement the regional workforce agreement goals.

## Take care of Metro parks projects

Project status as of December 2022



## Looking ahead

In 2023 and beyond, improvements and activity around improvements at Blue Lake Park are ramping up. In addition, community engagement around the park renovation and master plan are beginning. 2023 will also see the completion of the ADA improvements to the Oxbow Boat Launch parking lot.

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

- Number of projects out of priority list substantially complete
- Project status for each of the Take Care of Metro Parks projects over time
- Number and status of projects related to increasing accessibility across Metro's portfolio (ADA pilot at Graham Oaks Nature Park and improvements at Oxbow boat launch parking)
- Number and participation in engagement activities for Blue Lake Park renovation and Lone Fir Cultural Healing and Heritage Garden; feedback on participation from community members

## LARGE SCALE COMMUNITY VISIONS

\$30 million for green investments in regional transformative projects,

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

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**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.

### Large scale community visions milestones complete as of 2022

- 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.
- In summer of 2022 a notice of funding availability for an initial \$10 million pilot grant cycle has been open.
- Staff completed meetings with 10 potential partners around the region to solicit interest and assess project compatibility.
- 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 – Land acquisition 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

### Large scale community visions milestones complete in 2022 (by the numbers)

Category	During calendar year 2022
Number of letters of intent submitted for pilot round	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

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## ADDRESSING THE BOND CRITERIA

This section provides detailed examples of progress to date related to the three bond criteria that govern bond programs: racial equity, climate resilience and community engagement. While it will take time to fully evaluate progress on the bond criteria, early results point to:

- Continued utilization of community engagement approaches to increase participation and build trust with BIPOC communities that build on feedback received to date, incorporate lessons learned from previous engagement activities and feature focused engagement opportunities.
- Completion of land acquisitions that demonstrate alignment with the bond's climate resilience criteria and have been informed by community feedback on priorities for land protection.
- Early feedback from park providers around the region that underline the impact of engagement in the local share and trails programs on building capacity around community engagement and racial equity related approaches to investments in parks, trails and natural areas.
- Development of resources and frameworks that will help evaluate the impact of bond investments on the region's climate resilience, advancing racial equity, accessibility and economic impact.
- Preparation to ensure that bond funded investments advance ADA accessibility and support efforts to increase workforce equity in construction projects

Moving ahead, increased bond investments and activities will allow for deeper evaluation:

- More data is needed to understand how community members experience participating in bond related engagement activities and how they continue to participate in bond related engagement.
- Increased volume of land acquisitions will allow for deeper analysis of impact on key pillars of climate resilience including habitat connectivity, anchor habitats and water quality and quantity
- Initial results from tracking workforce participation on Parks and Nature bond funded projects, along with more detailed analysis of COBID participation, will deepen understanding of the bond's economic impact on businesses and workers across the region.

## LIST OF 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.
• 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
• Improve the accessibility and inclusiveness of developed parks.
• Include strategies to prevent or mitigate displacement and/or gentrification resulting from bond investments.

- Set aspirational goals for workforce diversity and use of COBID contractors and work to reduce barriers to achieving these goals; demonstrate accountability by tracking outcomes and reporting impacts.

Figure 1, Snapshot of community engagement activities completed in 2022. More detailed information about engagement activities can be found in appendix xx. More information about the bond evaluation outcomes work can be found in appendix xx.

## Engagement activities completed

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

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

*Engagement with committees of community members to shape solicitation for bond funded 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)
- 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*

- 2 BIPOC focused roundtables of 60 community members to report back on land acquisition priorities before Council approved land acquisition road maps
- Meetings with urban Indigenous community on land acquisition priorities
- 2 engagement sessions with Chinese community on Lone Fir

- Ongoing communication with the region's conservation community, park providers, urban Indigenous community to share updates, solicit feedback on bond programs

## How it shaped programs

- 12 priority projects submitted for local share funds reflect community feedback and priorities
- Council approved land acquisition road maps include areas highlighted through community feedback like Johnson Creek watershed
- Solicitation for trail grant awards shaped by community, trails advocates; 12 trail projects awarded funds in line with feedback shared through survey
- Solicitation guidebook for community choice grants shaped by community grants program design and review committee

## Post-engagement evaluation completed to date

- Interviews and surveys with park providers participating in the bond's local share and trails program
- Interviews and surveys with community members who participated in engagement around Chehalem Ridge planning
- Interviews and surveys with community members who participated in engagement around the bond's protect and restore land program
- Building list of partners and individuals who participated in multiple engagement opportunities to invite to future engagement activities

## Tools and 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 to operationalize meaningful engagement parks and nature project identification, development and activation

## Figure 2, Community engagement case study: [Community Choice grants](#)

The parks and nature bond's community choice grant program, recently launched in Western Washington County, puts community members in the lead to imagine, design and choose parks and nature projects

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 reached out to the following organizations with a focus on 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, 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*)
- Conservation organizations (*Tualatin River Watershed Council*)
- Advocacy organizations/alliances (*National Alliance on Mental Illness (NAMI)*)

**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*

- Working with a consultant, Dialogues in Action, Parks and Nature staff made significant progress in developing and piloting an evaluation framework to articulate and measure outcomes for the bond, underway since 2021 and that builds upon and broadens current efforts to report on specific investments in parks, trails, and natural areas. Staff worked to articulate long term impacts for bond investments and activities meant to align with the bond criteria and launched a data collection pilot to test the framework developed and to collect preliminary findings that pointed to impact and identified areas for improvement. Staff also worked to keep the oversight committee updated on this effort.
- [Dashboard on bond progress on website](#)
- Quarterly reports to oversight committee on bond investments and activities completed
- Memos to Council and the oversight committee that summarize key features and bond criteria met for each property purchased

**Improve the accessibility and inclusiveness of developed parks.**

*Tools and strategies developed in 2022 to advance accessibility and inclusiveness of developed parks*

- 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.
- [ADA improvements to Oxbow boat launch](#) parking complete with construction beginning in 2023
- Several projects submitted by the region's park providers for local share funding are designed to advance accessibility at parks and natural areas across the region. One example is THPRD's project to upgrade a section of the boardwalk on the Waterhouse Trail in the Willow Creek Greenery, part of the Five Oaks Triple Creek neighborhood in Beaverton to be in alignment with ADA accessibility guidelines.

**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 Metro Parks and Nature sphere of responsibility. Parks and Nature staff have identified markers to demonstrate making progress on this criteria through bond investments that provide opportunities for community members to truly help shape projects in their own communities and to benefit economically through workforce and contracting opportunities.
- In 2022, significant progress has been made to advance programs or processes that allow community to shape investments in their own communities 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 launched in 2022.

**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. Parks and Nature staff working on several bond programs have encouraged prime contractors to partner with COBID certified firms as 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, finalized in May 2022, 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 local share 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.

## **BOND CLIMATE RESILIENCE CRITERIA**

List of 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
- 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*

- All built projects managed by Metro or occurring on property stewarded by Metro must apply Metro's green building policy, which has identified the Sustainable SITES Initiative's (SITES) Gold standard as the parks development standard. Key tenets of this goal include application of a systems thinking approach and life-cycle analyses in design, materials selection, and ongoing operations.
- 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 (see more detail in appendix xx)
- Staff developed initial analysis and data sets that allow for tracking of how individual land acquisitions address the bond's climate resilience criteria

Figure 2, 2019 parks and nature bond funded land acquisition by habitat types protected

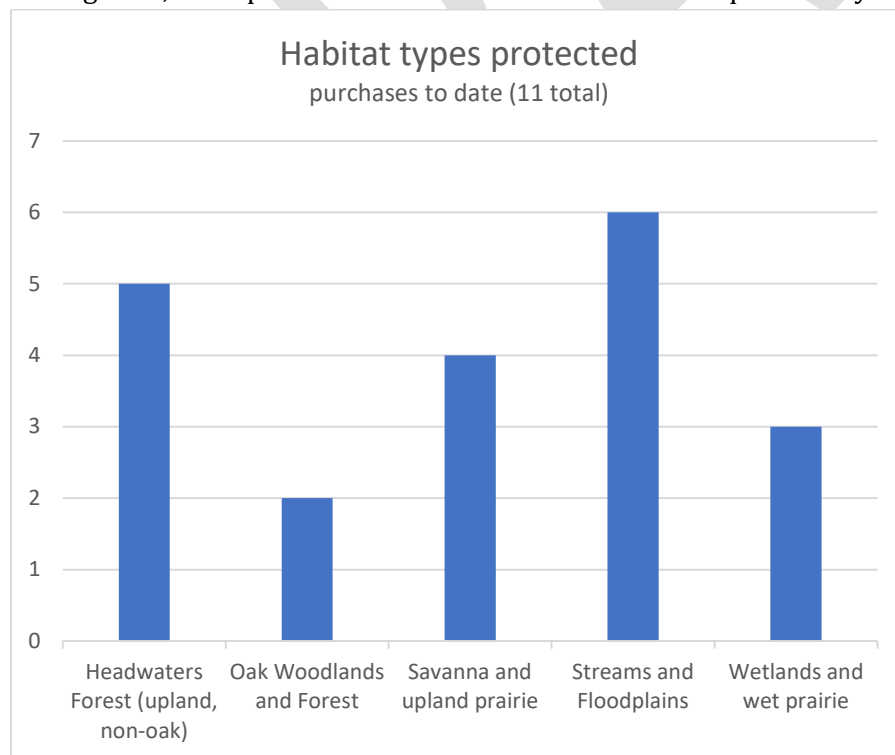
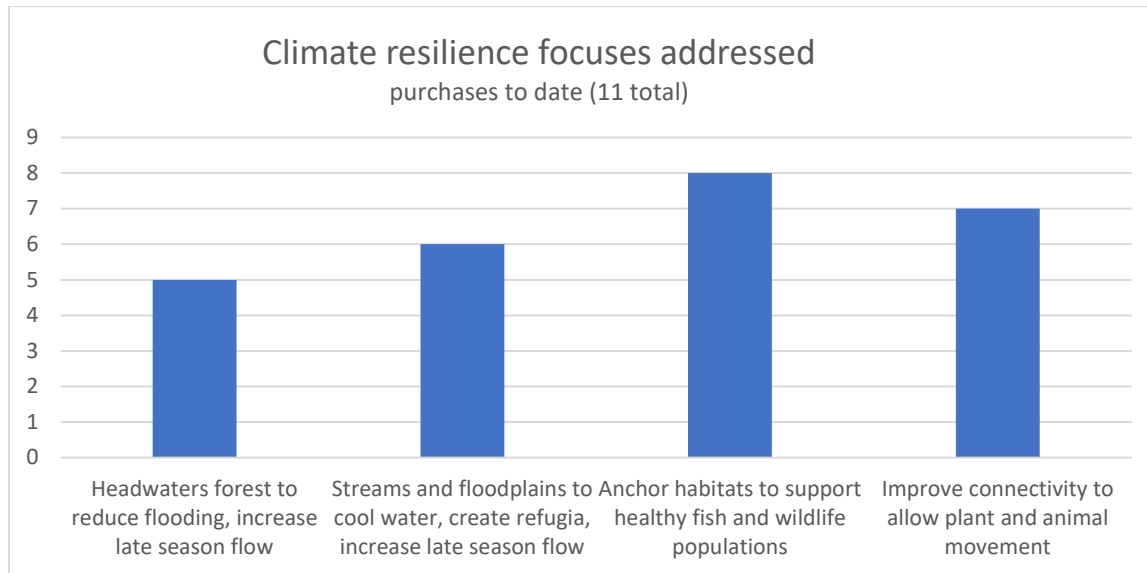


Figure 3, 2019 parks and nature bond funded land acquisitions by impact on climate resilience criteria factors



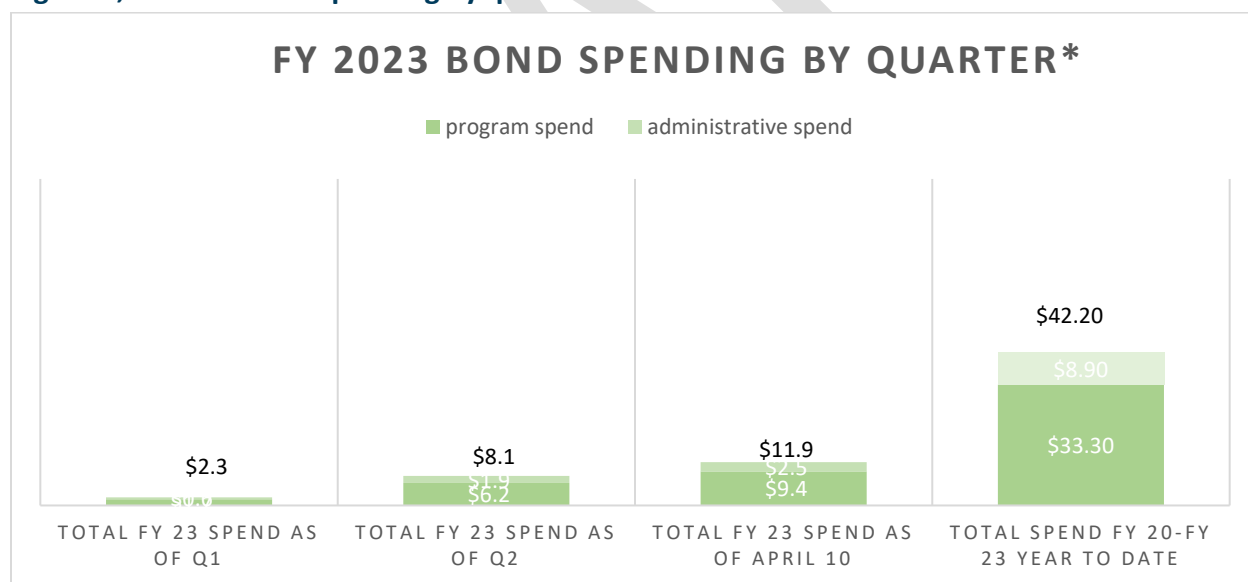
## BOND FINANCIAL REPORTING

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 in April 2020. So far, Metro has issued \$200 million in bonds for the start of 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.

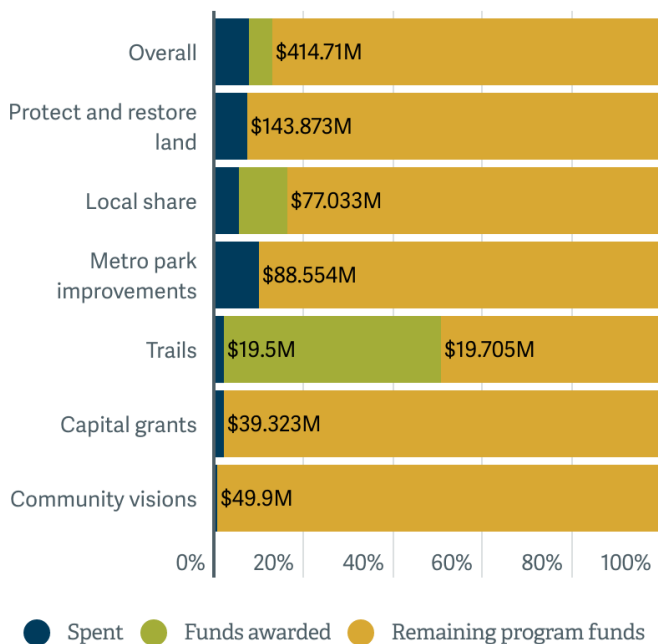
As of early May 2023, Metro has spent \$42 million of bond proceeds available and has awarded \$24.8 million through trail grants and local share with a current administrative rate of about 23 percent of total bond spending to date. The administrative rate covers a portion of overhead expenditures that cannot be tied directly to an action related to the bond's capital investments. Some of these services include, but are not limited to, legal costs and financial support that do not correspond directly to a single project, but are essential to delivering on the bond's objectives and outcomes.

**Figure 1, FY 2023 bond spending by quarter**



**Figure 2, bond spend by program area as of December 2022**

\$60.3 million had been spent or awarded to projects by December 31. Administrative costs accounted for 24% of spending. This share of costs is expected to drop quickly as bond programs ramp up spending.



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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, staff anticipate 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.

### Contract equity

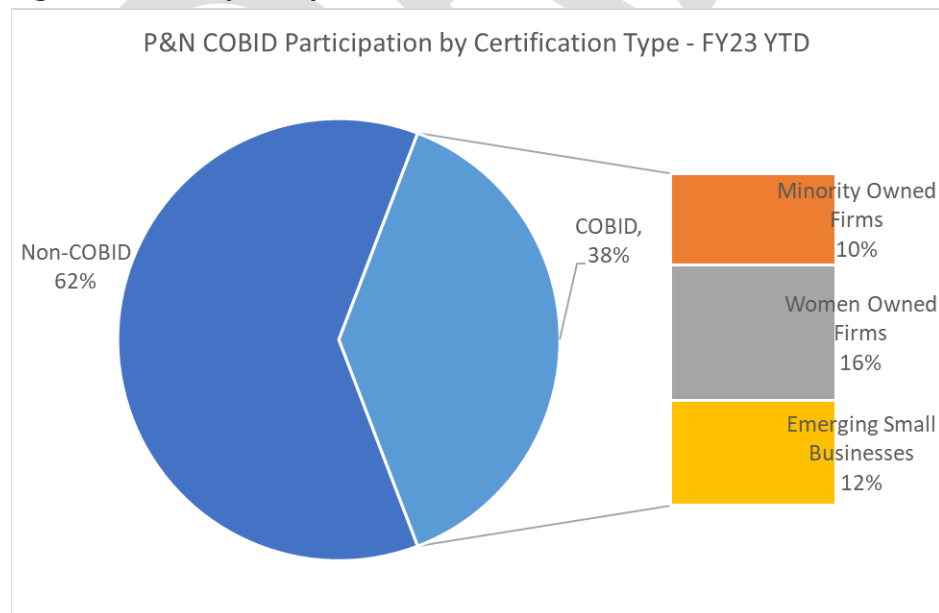
Metro tracks the percentage of bond spending with minority owned, women owned and emerging small businesses that are certified with [Oregon's Certification Office for Business Inclusion and Diversity \(COBID\)](#). In addition, Metro tracks the spending percentage with each type of COBID certification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

**Figure 3, COBID participation for 2019 Parks and Nature bond as of May 2023**



### Looking ahead

In 2023 and beyond, staff will continue to track COBID participation rates to the 20% COBID participation floor across the bond for prime and sub-contractors. Staff will also explore opportunities to increase the nuance and granularity with which we're tracking COBID participation across all large contracts for the 2019 Parks and Nature bond.

In addition, in future years, staff will begin to track workforce participation on bond funded construction 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 equity agreement.

### *2006 natural areas bond measure*

Metro sold the remaining 2006 natural areas 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%
<b>Total Program Spend</b>	<b>414,262</b>	<b>6,214,397</b>	<b>13,599,053</b>	<b>9,449,219</b>	<b>29,676,932</b>	<b>76.77%</b>
Admin						
Personnel	100,702	556,026	592,328	413,776	1,662,832	
M&S or Capital or Transfer	711,826	1,017,825	3,479,284	2,108,522	7,317,457	
Total	812,528	1,573,851	4,071,612	2,522,299	8,980,290	23.23%
<b>Total Bond Spend</b>	<b>1,226,790</b>	<b>7,788,248</b>	<b>17,670,665</b>	<b>11,971,518</b>	<b>38,657,221</b>	
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%
<b>Total Program</b>	<b>247,747,354</b>	<b>393,638</b>	<b>248,140,992</b>	<b>90.20%</b>
Admin				
Total	26,492,684	460,842	26,953,526	9.80%
<b>Total Bond</b>	<b>274,240,038</b>	<b>854,480</b>	<b>275,094,518</b>	
Administrative Spending as a % of Total Bond Spend	9.66%	53.93%		9.80%

## APPENDIX

### BOND MEASURE PROGRAM CRITERIA

#### Community engagement and racial equity criteria

Investments in all program areas must satisfy all of the following community engagement and racial equity criteria:

- Meaningfully engage with communities of color, Indigenous communities, people with low incomes and other historically marginalized communities in planning, development and selection of projects.
- Prioritize projects and needs identified by communities of color, Indigenous communities, low-income and other historically marginalized groups.
- Demonstrate accountability for tracking outcomes and reporting impacts, particularly as they relate to communities of color, Indigenous communities, people with low incomes and other historically marginalized communities.
- Improve the accessibility and inclusiveness of developed parks.
- Include strategies to prevent or mitigate displacement and/or gentrification resulting from bond investments.
- Set aspirational goals for workforce diversity and use of COBID contractors and work to reduce barriers to achieving these goals; demonstrate accountability by tracking outcomes and reporting impacts.

#### Climate Resilience Criteria

All projects funded by the bond must identify at least one climate resilience criterion that the project will satisfy from among the following:

- 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.
-

## GLOSSARY

**BIPOC:** Abbreviation for Black, Indigenous, and people of color

**COBID:** [Oregon's Certification Office for Business Inclusion and Diversity](#). The primary goal of certification is to level the playing field by providing certified firms a fair opportunity to compete for government contracts regardless of owner ethnicity, gender, disability or firm size.

**Construction Career Pathways:** Regional effort of public agencies teaming up with stakeholders from private industry, apprenticeship programs, unions and community-based organizations to provide reliable career pathways for women and Black, Indigenous, and people of color in the construction trades.

**Refinement plans:** Formal publicly adopted road maps outlining strategies for land acquisition that reflect Council direction, community input and give Metro staff the guidance to protect habitat and land for future trails.

**Bond refinement:** The work to turn the 2019 parks and nature bond measure language into programs ready to invest in parks, trails and natural areas across the region.

## **BOND REFINEMENT COMMUNITY ENGAGEMENT SUMMARY, FEBRUARY 2023**

Does not include Metro Council or tribal government engagement

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**Table 1, detailed snapshot of progress on community engagement and accessibility by bond program, as of December 2022**

	Efforts completed to date	Outcomes measured to date	Reporting efforts to come
<b>Protect and restore land</b>	<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>
<b>Take care of Metro parks</b>	<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 (12 qualitative interviews, 14 quantitative survey)</p>	
<b>Local share</b>	<p>Ongoing: Metro staff continue to provide support to park providers working to engage marginalized communities in</p>	<p>Bond evaluation outcomes project interviewing park providers on impact of</p>	<p>Metro requires local share recipients to conduct community engagement as part of their projects and their</p>

	Efforts completed to date	Outcomes measured to date	Reporting efforts to come
	project selection, development or site activation	community engagement efforts to date (24 qualitative interviews, 9 quantitative survey)  Local share projects funded to date reflect focus on community engagement and accessibility (acquisition of site near Gresham's SW community park, <a href="#">THPRD projects</a> )	annual reports will summarize efforts on engagement and accessibility.  Follow up with park providers on community engagement efforts in future years
<b>Trails</b>	Fall 2021-spring 2022: Trail grant solicitation was shaped by working group of community representatives, trail advocates, and external government partners.  Summer 2022: Online survey (translated into 5 languages) on trail projects for funding received 1,798 project-specific comments from 1,551 unique respondents.	Survey responses were considered in trail grant project selection.  Working group membership and participation from community-based organizations helped shape grant solicitation process	Metro requires grantees to conduct community engagement as part of their projects. Grantees' annual reports will summarize engagement efforts.
<b>Capital grants</b>	Fall 2021: outreach to recruit community members to join the community choice grants program design and review committee (see community choice grants case study)  Winter 2021-spring 2022: deep engagement with community choice	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	Interviews/surveys of individuals participating in community choice grants process  Projects (type, location) selected through the community choice grants

	Efforts completed to date	Outcomes measured to date	Reporting efforts to come
	grants program design and review committee to develop the program handbook for the community choice grants		
<b>Large scale community visions</b>	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

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**Table 2, summary of bond related engagement activities from 2018-2022**

Community engagement activity	Who was engaged	How feedback was used	Principles of continuity applied?	Was evaluation conducted to determine impact?
2018-2019: forums and focus groups on bond development	Park providers, community organizations, conservations organizations	Captured in this summary; helped to shape specific programs and focuses in the bond measure	Yes, participants included many who have engaged in previous activities and have been invited to participate in engagement once the bond passed	No
2020-2022: engagement with urban Indigenous community members on priorities for bond funded land acquisition	Members of the urban Indigenous community, members of the Native American Community Advisory Committee	Shaped data collected; affirmed priorities for acquisition/restoration that benefitted salmon; prioritized specific geographies for acquisition like Johnson creek watershed council	Yes, cohort of urban Indigenous community members have been engaging with Metro on multiple projects before and after	Yes; bond evaluation outcomes project collected 2 interviews and  Evaluation of experience of members of urban Indigenous community of participating in engagement activities around bond land acquisition (2 interviews, 13 survey responses)
2021-present: Community Choice grants program design and review committee meeting ongoing	Individuals that applied to be on the design and review <a href="#">pilot committee</a>	To shape the grant program handbook including criteria, priorities and solicitation and review process	6 members were appointed in 2021; 4 have continued on into 2022	2 interviews conducted of members on their experience; future evaluation planned

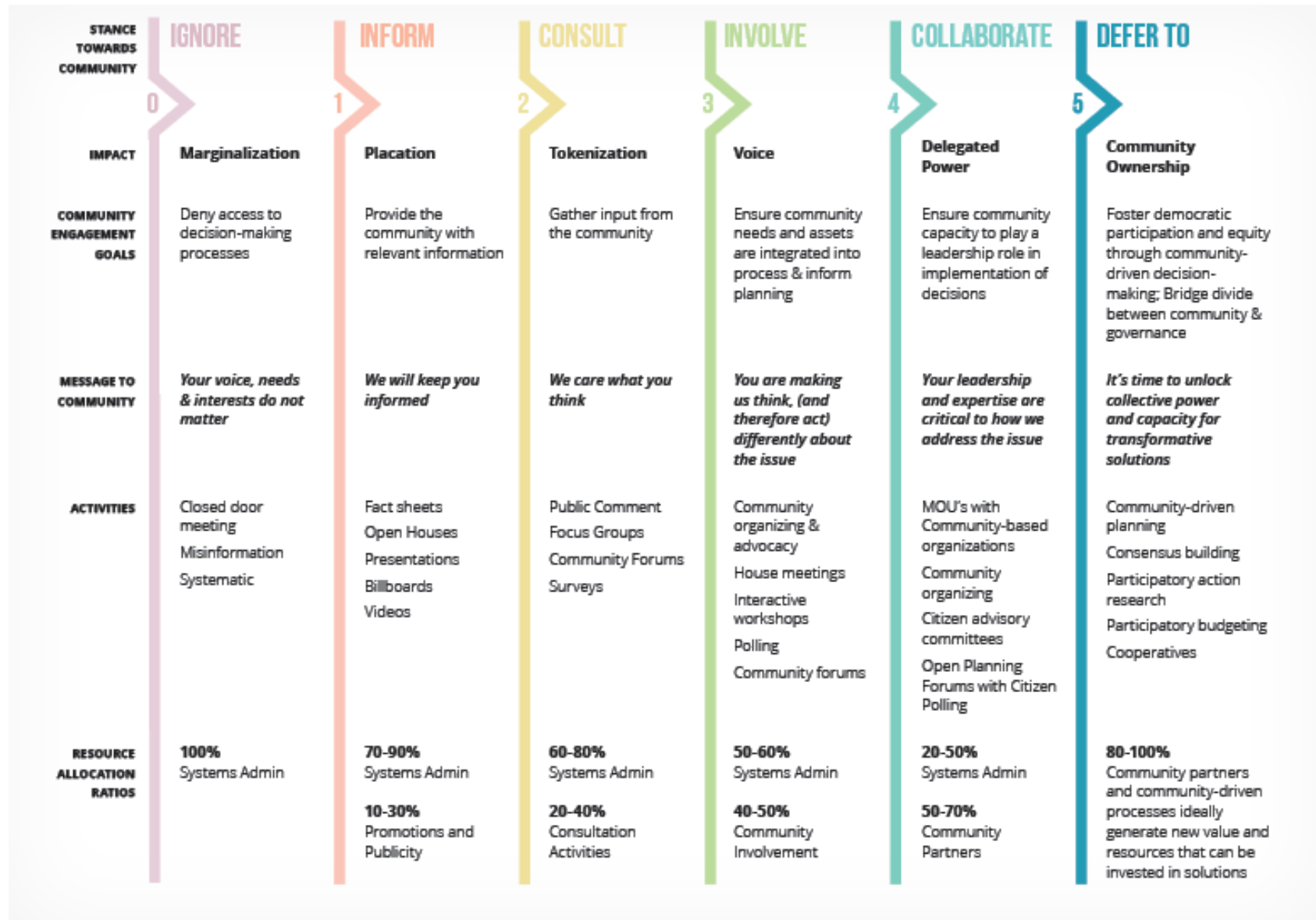
Community engagement activity	Who was engaged	How feedback was used	Principles of continuity applied?	Was evaluation conducted to determine impact?
2021: BIPOC-focused engagement sessions to shape priorities for trail gap acquisition.	Focused engagement session with 100 community members who were invited to attend through partnering with community organizations	Informed how 6 factors were prioritized in the acquisition of future trail segments	Participants were invited to attend other bond engagement opportunities;	
2021: General community engagement sessions on				
2021-2022: BIPOC focused engagement sessions to help shape priorities for bond funded land acquisition	<p>BIPOC community members, people with disabilities</p> <p>6 affinity group roundtables for BIPOC and people with disabilities in fall 2021 (with over 100 participants) and 2 follow up sessions in winter 2022 (with 60 participants)</p>	Helped identify priorities for land acquisition and restoration based on lived experience	Same individuals invited to participate in two separate focus groups; have been invited to other engagement activities	No
Summer 2022: Survey on priorities for trail grants translated into 5 languages	Individuals across the region; 1500 responses			

Community engagement activity	Who was engaged	How feedback was used	Principles of continuity applied?	Was evaluation conducted to determine impact?
<p>Fall 2022: two engagement activities on Lone Fir Cultural Heritage and Healing Garden</p>	<p>PN staff held three engagement sessions in November with member of Chinese and Chinese American communities.</p> <p>The focus group sessions were designed and assembled with input from partners with the Oregon Chinese Consolidated Benevolent Association, the Chinese American Citizen's Alliance, the Lone Fir Cemetery Foundation, and a contracted engagement professional.</p> <p>PN staff have been connecting separately and individually with advocates for people with mental illness.</p>	<p>Several participants recommended that the final project include culturally significant trees and other plantings. Additionally, there were many requests for allowing the community to practice customary rituals for honoring the dead, such as burning incense and leaving offerings. Many participants expressed pain at the erasure of their history – as well as a desire to have that history shared in this memorial project.</p>	<p>A small work group has recently been assembled to provide input on project issues.</p>	

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## THE SPECTRUM OF COMMUNITY ENGAGEMENT TO OWNERSHIP



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**Table 3, snapshot of progress made on bond racial equity criteria as of December 2022**

	<b>Efforts completed to date</b>	<b>Outcomes measured to date</b>	<b>Reporting efforts to come</b>
<b>Protect and restore land</b>	<p>Themes heard through community engagement with BIPOC communities in 2021 and 2022 are prioritized in land acquisition road maps that direct which parcels are acquired</p> <p>Initial analysis conducted in 2021 and 2022</p>	<p>Description in memos to Council and the oversight committee how each land acquisition aligns with bond and program criteria and community priorities</p> <p>COBID participation rate across the bond (currently at 39 percent)</p>	<p>Exploring more fine grained COBID participation tracking and strategies to increase COBID participation for prime and sub-contractors</p>
<b>Take care of Metro parks</b>	<p>Incorporating Metro's Construction Career Pathways Framework requirements for diverse workforce participation in Metro's own projects</p>	<p>COBID participation rate across the bond</p>	<p>Tracking on workforce participation for Metro's construction projects (likely to begin when construction kicks off in fiscal year 2024)</p>
<b>Local share</b>	<p>COBID and workforce requirements apply to local share projects</p> <p>Attention to anti-displacement</p>	<p>Bond evaluation outcomes project interviewing and surveying park providers on efforts related to advancing racial equity through investments in parks, trails and natural areas</p>	<p>Mapping of local share projects over time with other data layers (equity focal areas)</p>

	Efforts completed to date	Outcomes measured to date	Reporting efforts to come
<b>Trails</b>	<p>Match requirements for trail grants prioritized equity focal areas<sup>1</sup> within a mile of the project</p> <p>COBID participation and workforce requirements apply to construction projects funded by trail grants</p>		<p>Mapping of trail projects awarded across the region overlayed with equity focal areas</p> <p>Projects that receive funding will be asked to report on activities related to advancing racial equity</p>
<b>Community Choice grants</b>	<p>Focus of community choice grants in underserved neighborhoods of District 4 (Aloha and Elmonica)</p>		<p>Reporting on projects (location and type) selected through community choice grants process</p> <p>Interviews and surveys of community choice grant participants</p>
<b>Large scale community visions</b>	<p>Projects that submitted a letter of intent (especially OMSI's waterfront education park and Albina Vision Trust) have centered advancing racial equity as key to the overall project vision and concept</p>		<p>Projects that receive funding will be asked to report on activities related to advancing racial equity</p>

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<sup>1</sup> Defined as census tracts that represent communities where the rate of Black, Indigenous, or People of Color (BIPOC), people with limited English proficiency (LEP), or people with low income (LI) is greater than the regional average. Additionally the density (persons per acre) of one or more of these populations must be double the regional average.

	Efforts completed to date	Outcomes measured to date	Reporting efforts to come

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## 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

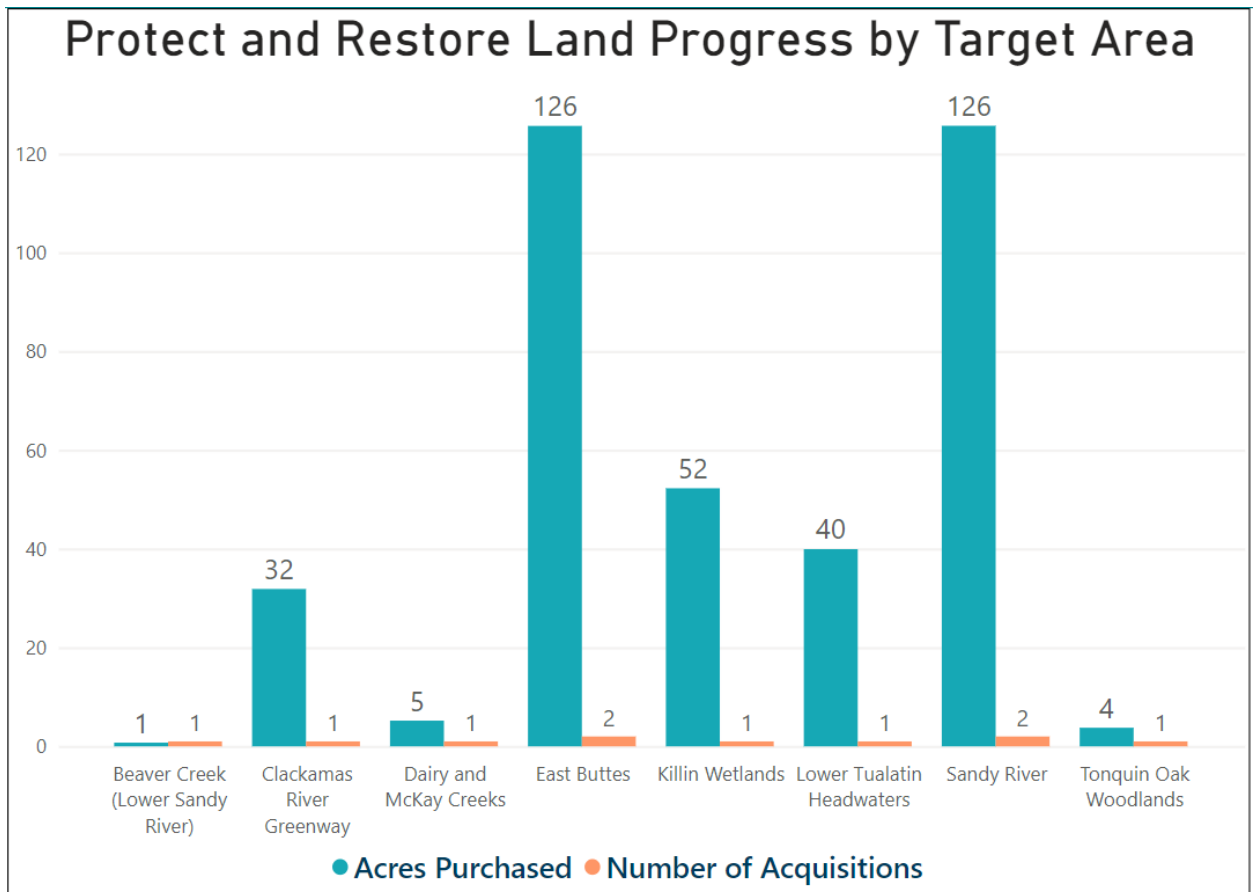
to contractors or sub-contractors?		continue to update committee on this topic	participation for contractors, not sub-contractors
Does Metro's COBID reporting disaggregate by type of contractor? Explore ways for Metro and Parks and Nature to analyze and understand the COBID participation figures on a 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 <a href="#">Metro's construction career pathways</a> project and the <a href="#">Regional Workforce Labor Agreement</a> ?	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 studies and 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
<p>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?</p> <p>Doing so helps determine if there is effective engagement if folks involved early on are continuing to be re-engaged.</p>	February 2023	Partially complete; staff included information in 2022 staff report	<p>Staff provided information showing continuity of individuals participating in multiple bond related engagement activities.</p> <p>Staff have not tracked what percent of individuals are engaging activity to activity yet, but that is something we can plan for the future</p>

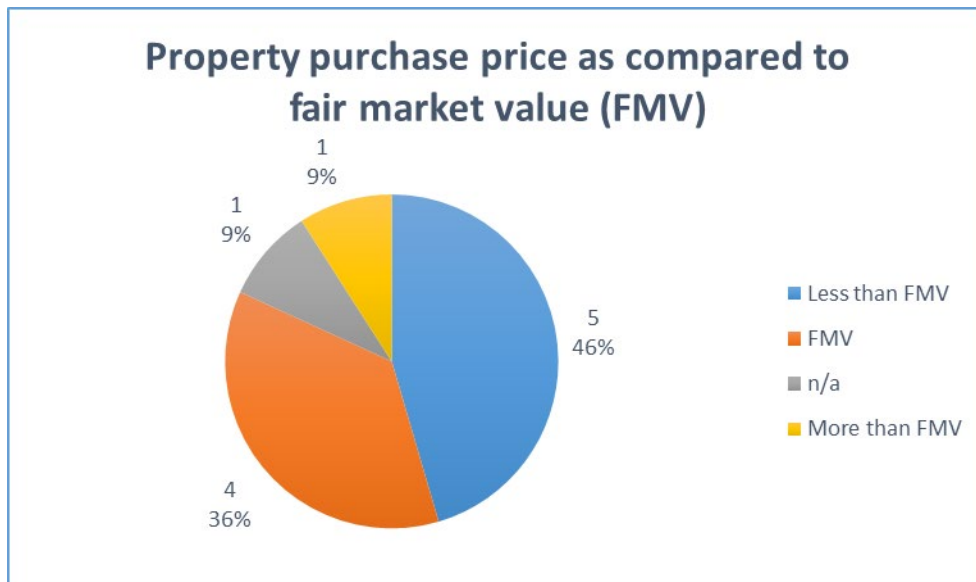
## Acquisitions to date by target area



### *What is this chart?*

Through the policy established in the [2019 parks and nature bond measure](#) and the [target area refinement plans](#) the Metro Council has directed staff to acquire properties in 24 regional target areas that meet the refinement plan goals. Each property varies in size and other features. This chart displays both the number of properties purchased and acres protected in each target area through the Protect and Restore Land program over the lifetime of the 2019 bond. Through December 31, 2022, Metro staff have acquired 10 properties totaling 385 acres across 8 target areas. This number will expand over time as more properties are purchased across all target areas.

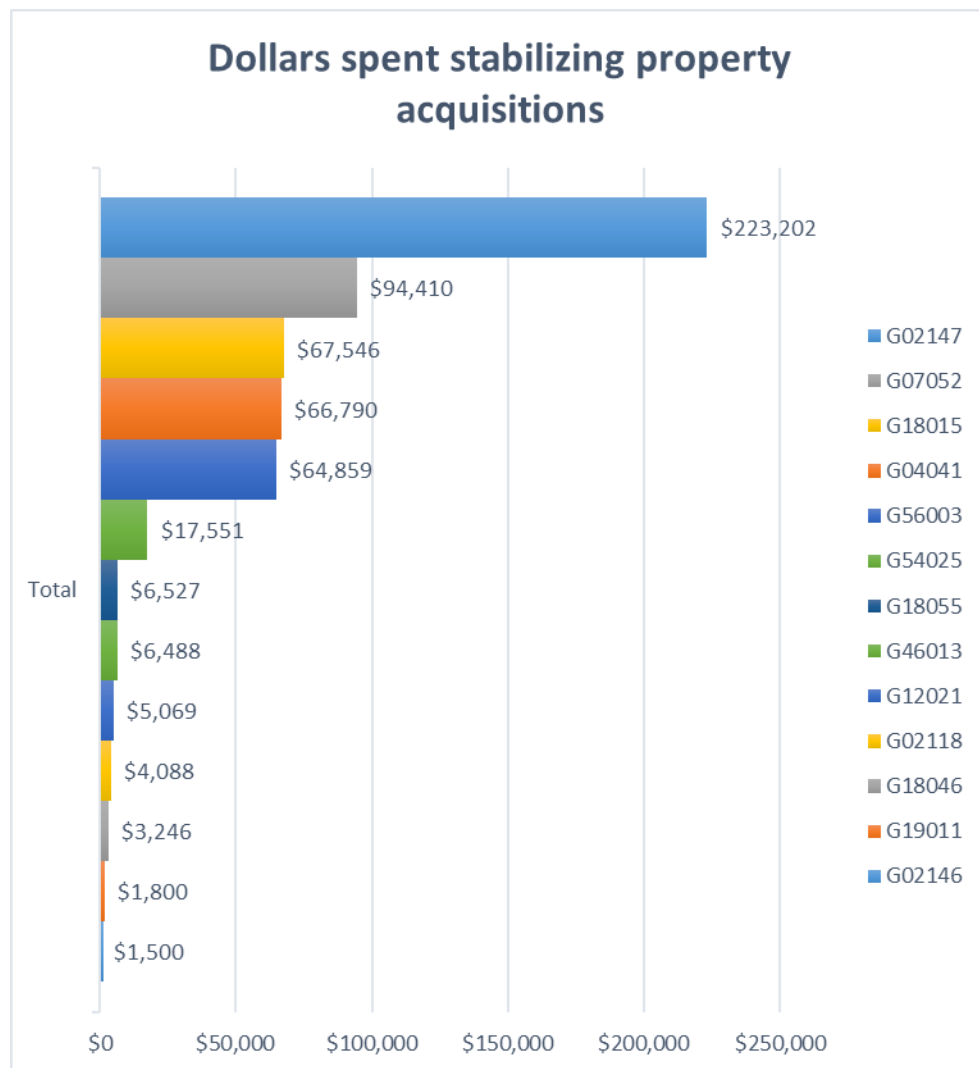
## Purchase price vs. market value



### ***What is this chart?***

The Metro Council may direct staff to purchase property at any price, but through the policy established in the Natural Areas Work Plan, the Metro Council has delegated authority to staff to acquire properties for fair market value as supported by an independent appraisal (with the exception of properties purchased for less than \$50,000, which do not require an appraisal). The Chief Operating Officer may purchase a property for up to 10% more than the value established by an appraisal provided certain conditions are met. This chart shows that most properties purchased to date were for fair market value or an appraisal was not required (i.e., the purchase price was less than \$50,000). This includes all purchases funded through the protect and restore land and create trails for walking and biking programs.

## Cost of stabilization to date



*Dollars spent through December 31, 2022*

*Note; labels starting with "G" are financial project codes; each one represents one property.*

### ***What is this chart?***

Stabilization is one of the four program activities eligible for protect and restore land funds. Stabilization is the phase of management that follows acquisition. During stabilization Metro uses bond funds to address threats that would otherwise compromise the values for which a new natural area is acquired. As no two properties are the same or have the same conditions present, stabilization plans and costs will vary by property. Metro uses a function-based approach to identify and implement stabilization activities appropriate to each site. Function-based stabilization focuses on actions that protect high ecological function and shift currently degrading conditions to a positive trend leading to Metro meeting the conservation objectives for which the property was purchased. Common stabilization actions include natural resource enhancement and property management and security actions. Important ecological functions addressed include key features such as: soil erosion control, habitat quality and trend, temperature and flow modification of streams, and public safety.

## Constraints

Current constraints on pace of implementation relate to staff capacity and market dynamics. Capacity is on the way up as Metro has recruited for and hired 2 senior conservation real estate positions in fiscal year 2023, with one assistant conservation real estate specialist position to be hired in the future. That will bring the total to 4 FTE (full time equivalent) working on acquiring real estate for Metro. New staff are getting up to speed quickly and have launched landowner outreach and relationship building activities. New landowner outreach is increasing rapidly which we expect will translate into more possible transactions.

The market continues to be dynamic and challenging for off-market transactions. The largest challenges in the market are still related to timelines and seller expectations of value – but Metro real estate staff are now also seeing impacts of low inventory and high interest rates on willing seller cultivation.