



# Staff report on bond work in calendar year 2022

For the Natural Areas and Capital Program  
Performance Oversight Committee

Spring 2023

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**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 financial data for the 2019 parks and nature bond, the remaining funds from the 2006 natural areas bond 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**

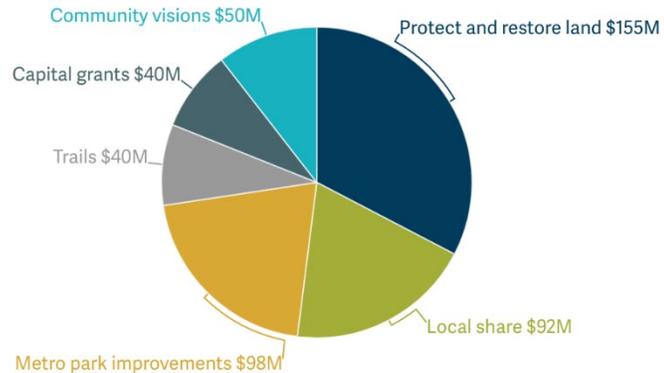
For more than two decades, voters have repeatedly trusted Metro to protect clean water, restore fish and wildlife habitat and provide opportunities for people to connect with nature close to home through the passage of three capital bond measures and a local option levy renewed twice.

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.



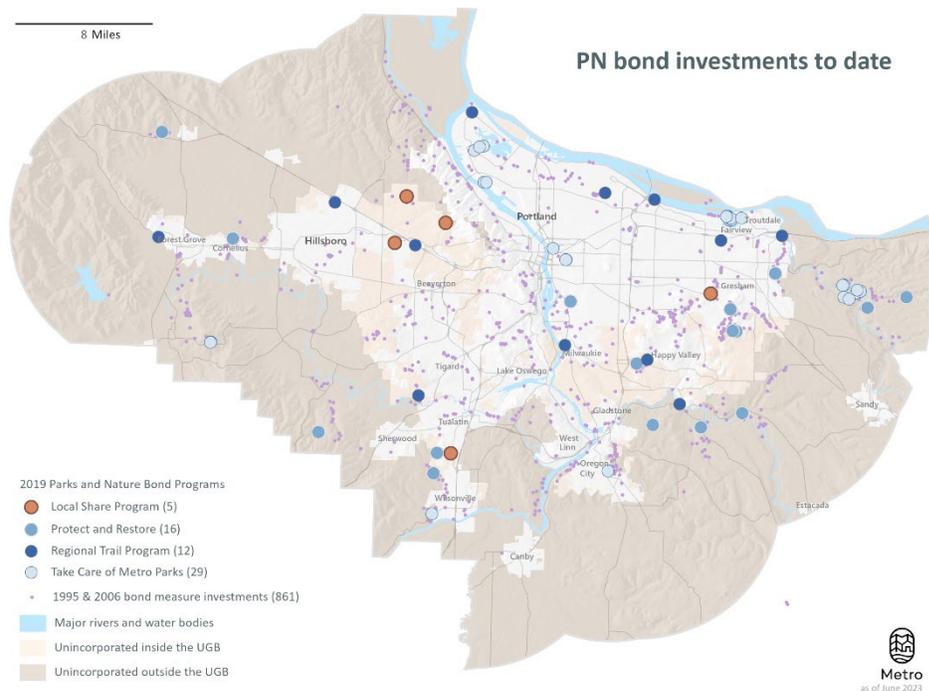
## OVERVIEW OF KEY THEMES RELATED TO BOND PROGRESS IN 2022

- 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, awards and activities 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.
- Further refinement of tools and frameworks that help the Natural Areas Oversight Committee 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 in the appendix, [exhibit 4](#).

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



	Investments made 2020-2022 (if applicable)	Awards made 2020-2022 (if applicable)	Notable projects 2020-2022
<b>Protect and restore land</b>	Over \$11 million invested to support 11 acquisitions for 386 acres and 1 trail gap acquisition (1,500 feet)	Not applicable	Acquisition at the Clackamas River confluence <a href="#">Acquisition by Coffee Creek</a>
<b>Take care of Metro parks</b>	Over \$9 million invested to complete Chehalem Ridge and Newell Creek completion, advance initial Blue Lake Park improvements (water line, building demo) and planning, design and engineering work to advance	Not applicable	<a href="#">Engagement at Lone Fir Cultural Heritage and Healing Garden</a>  Preparing for pilot of accessibility

	Investments made 2020-2022 (if applicable)	Awards made 2020-2022 (if applicable)	Notable projects 2020-2022
	readiness of health, safety and accessibility projects across Metro’s portfolio of developed parks		improvements at Graham Oaks  <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 acquire a parcel near SW community park and Tualatin acquire a parcel in the Basalt Creek area	<a href="#">\$5.3 million awarded to THPRD</a> for the Willow Creek Greenway Boardwalk in Beaverton, Heckman Lane Park and Trail in the North Bethany neighborhood, and two accessible play structures in Bonny Slope and Rock Creek.	<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="#">Awards included</a> key links in the regional trail system including Marine Drive trail, Clackamas River Trail and Westside Trail

## 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. With funding from the 1995 and 2006 natural areas bond measures, Metro has completed over 500 individual transactions resulting in over 15,000 acres of protected habitat funded. Since many of the opportunities for straightforward land acquisitions in the region have already been completed, staff anticipates that most of the transactions funded by the 2019 bond will be more complicated from a land use or process perspective.

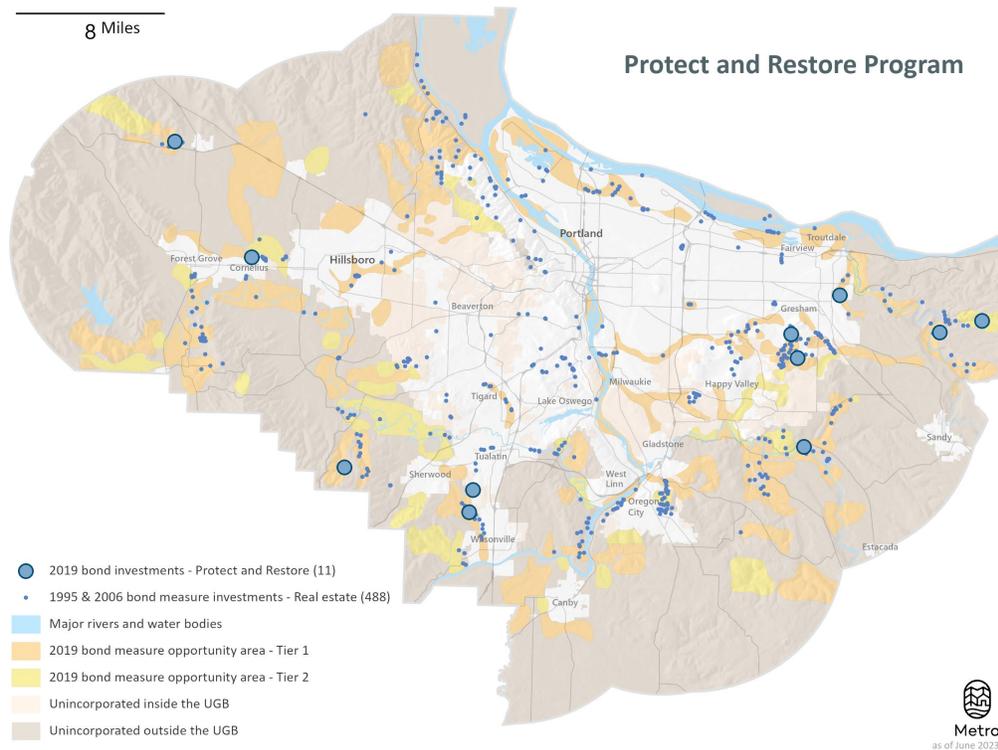
This program will also invest up to \$10 million of the create trails for walking and biking program to buy land where park providers will one day build regional trail connections.

### Protect and restore land program milestones completed as of calendar year 2022

- [Council approved land acquisition road maps](#) in April 2022 articulate strategic priorities and goals for land acquisition
- Hired real estate staff with the goal of having four full time employees working on real estate
- Developed real estate strategies for each target area to further identify targets for priority acquisitions
- From 2020 through December 2022, completed a total of 11 acquisitions across 8 of the 24 target areas, protecting 386 acres and spending a little over \$6 million on the properties
- Developing measures of success for land acquisitions, especially related to the bond measure's climate resilience criteria
- Refined 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
- Conducted outreach to over 100 landowners about acquisition opportunities
- Conducted community engagement activities to shape land acquisition road maps including: affinity group roundtables, in English and Spanish, for BIPOC and people with disabilities, engagement sessions for all community members, continuous engagement with members of the urban Indigenous community and an online survey on land acquisition priorities translated into 5 languages received over 1,700 responses
- Conducted interviews and surveys with community members who helped shape the development of the land acquisition road maps to understand experience of participating in that process

## Protect and restore land program 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 detailed real estate strategies completed for each of the 24 target areas in the Council approved land acquisition road maps	23 out of 24 target areas



### Looking ahead

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 protect and restore land program has built the tools needed to effectively and efficiently conduct land acquisition through a willing seller program. 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.

Staff anticipate being at full capacity by fall 2023 with a team of four real estate negotiators, along with the expansion and maturation of the acquisition pipeline. 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 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.

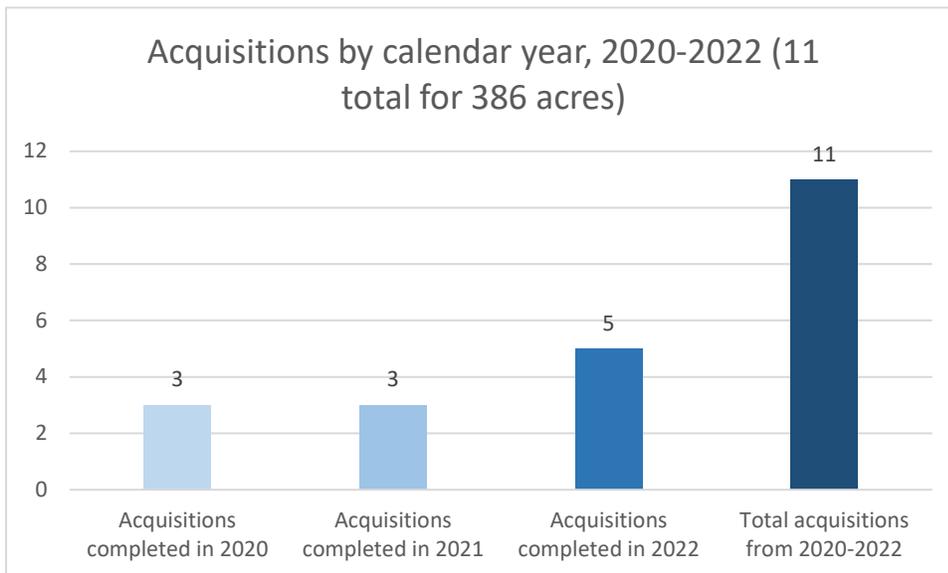
The real estate market continues to be dynamic and challenging. The largest challenges in the market on willing selling cultivate are still related to timelines and seller expectations of and real estate staff are now also seeing the impacts of low inventory and high interest rates.

As the portfolio of land acquisitions continues to grow, the protect and restore land team will refine a framework that measures success by connecting the features of individual properties acquired to the bond's climate resilience criteria. The team will also explore opportunities to identify community partners to pilot the community led acquisition included in the protect and restore land program definition in the bond measure.

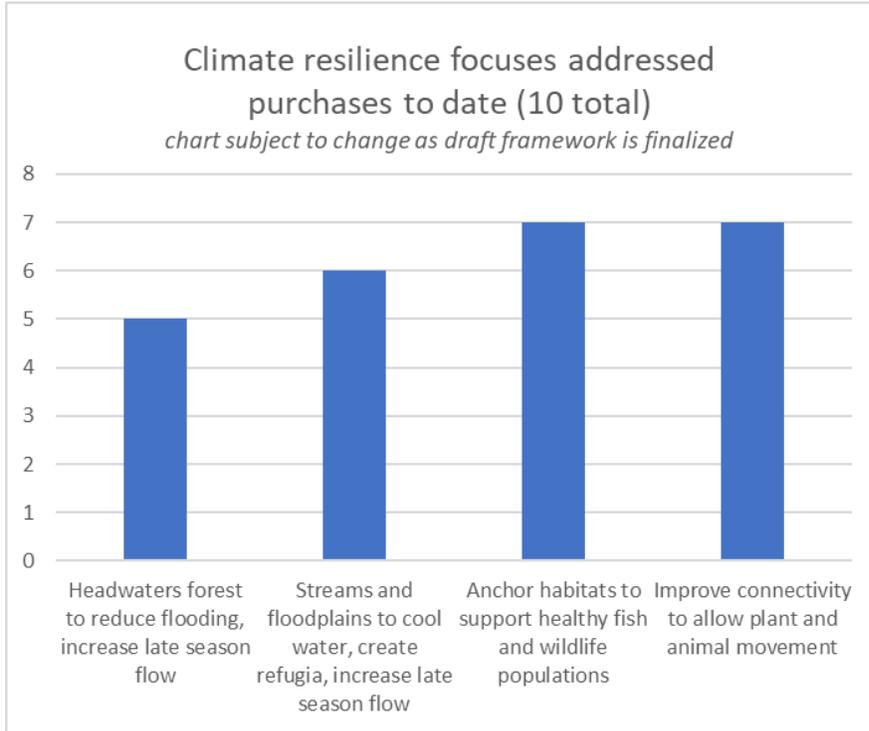
### Markers on progress for protect and restore land in 2023 and beyond

- Number of acquisitions made in each of the 24 target areas (status below as of December 2022)
- Number of trail gap acquisitions across the region
- Status and balance of acquisitions focusing on key habitat types
- Status and balance of acquisitions focusing on primary climate resilience strategies
- Bond criteria met by acquisitions

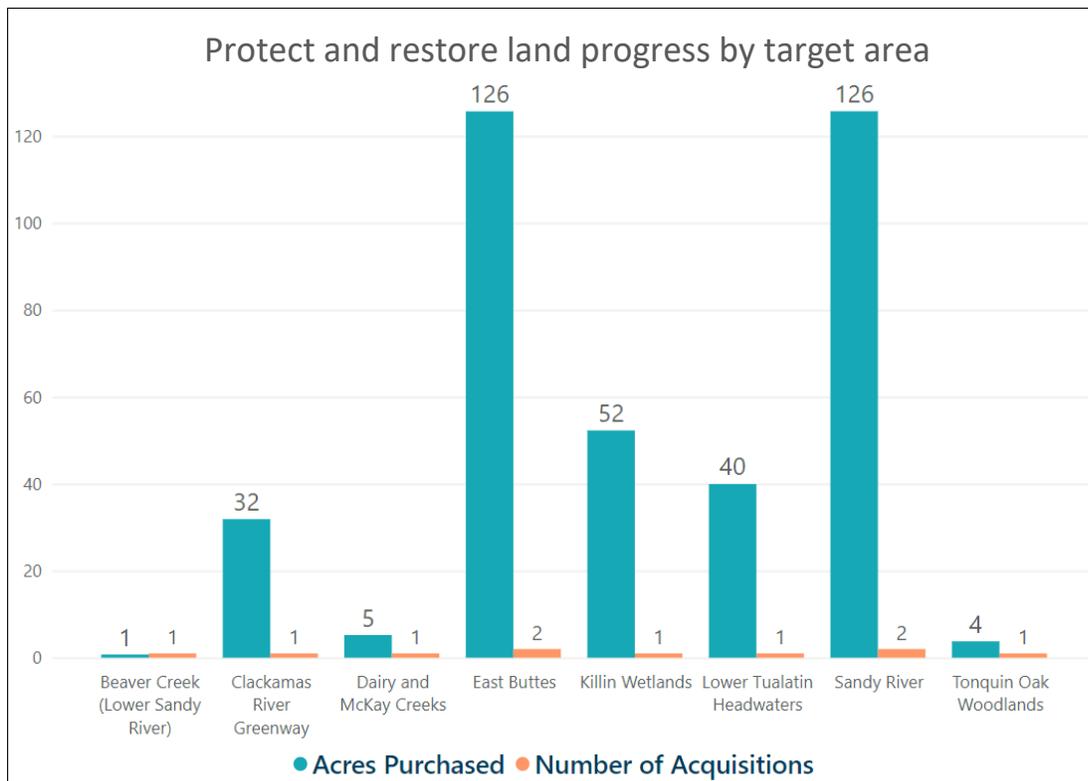
Figure 1



**Figure 2**



**Figure 3**

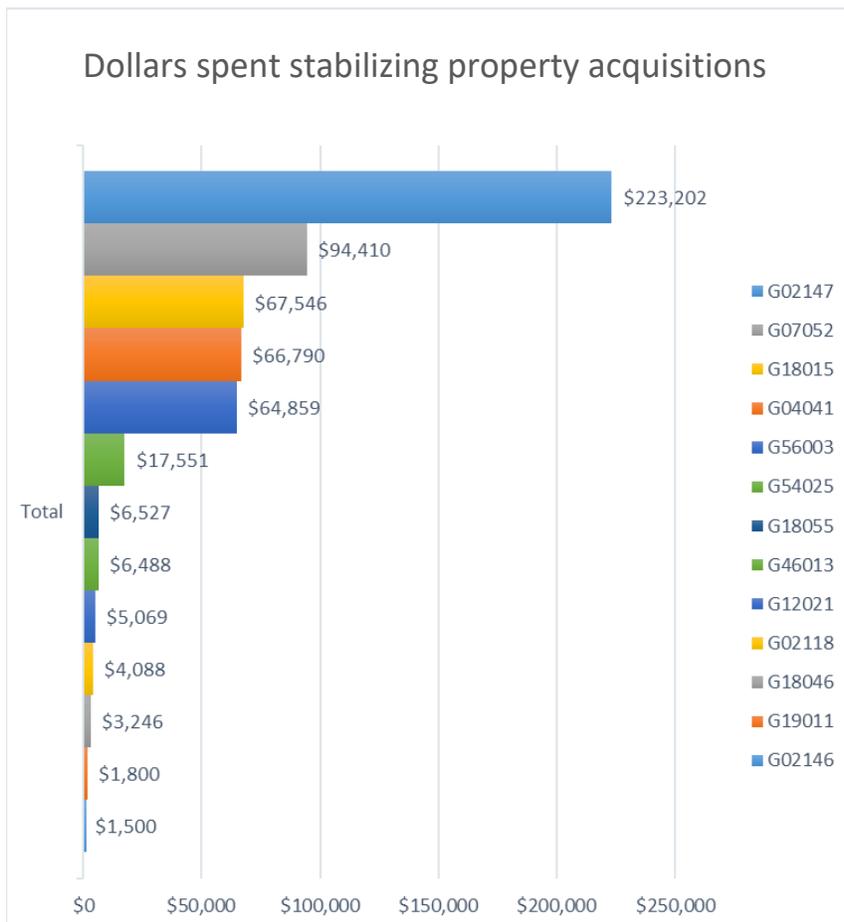


## Stabilization activities

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 during the development of long-term restoration and stewardship plans. These actions include infrastructure removal or improvement, replacing invasive species with natives and reducing stream erosion. From 2020 to December 2022, \$563,000 of 2019 parks and nature bond funding was spent on 13 stabilization projects including the 11 properties acquired with the 2019 parks and nature bond. The other two stabilization projects occurred on 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



**Figure 5, list of properties acquired with the 2019 parks and nature bond 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 program 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

## Local share

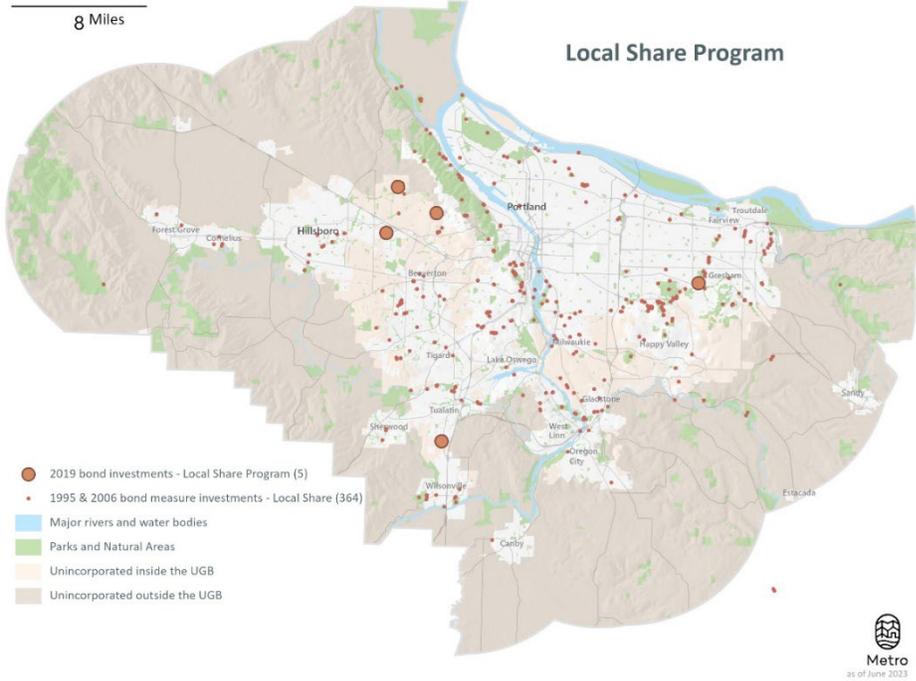
Local share distributes funds to the region's 27 park providers to build projects and purchase natural areas that are important to their communities.

**Projects funded**  
**5**  
**totaling**  
**\$10.3 million**

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

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)

**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 is preparing to finalize intergovernmental agreements to formalize funding awards for these 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 in 2023 and beyond. 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

## 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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**Walking and biking trails 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 trails program milestones completed as of 2022

- Developed solicitation process for the competitive trail grants in 2021, which involved collaboration with the region’s park providers and transportation agencies
- 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.
- In fall 2022, Parks and Nature staff hosted a training for grant recipients on conducting cultural resource assessments for inadvertent discoveries during ground disturbing activities.

### Walking and biking trails program 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

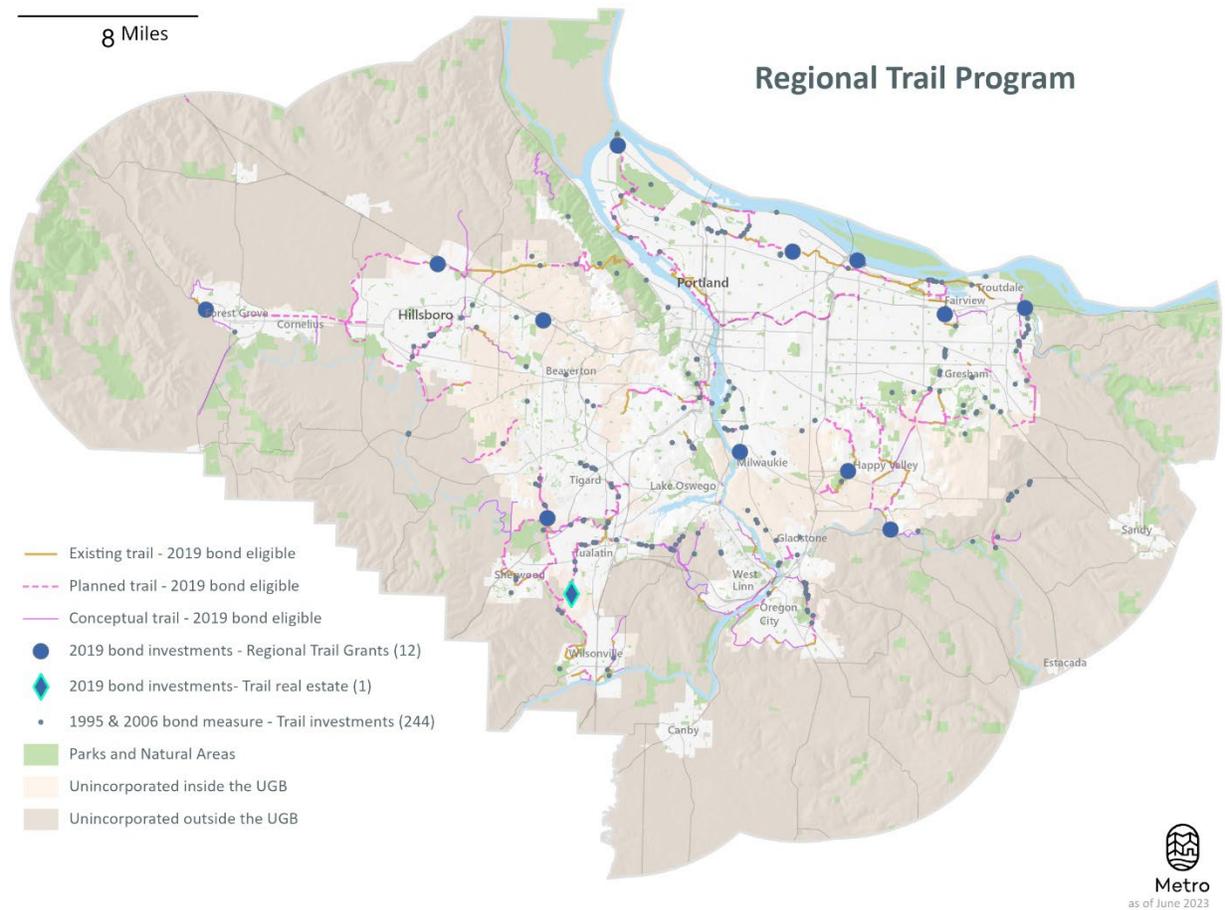
### Looking ahead

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)

**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 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, this program will include several rounds of grant solicitations in future years.

Nature in Neighborhoods capital grants are available to fund 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.

To date, this program also includes the Nature in Neighborhoods [Community Choice grants](#), which is piloting a participatory process to recommend up to \$2 million in grant funding to Metro Council to invest in projects selected by the community in Metro Council District 4 (Western Washington County) and that benefit BIPOC and other historically marginalized communities.

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

- Creation of 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 including a broad recruitment for committee members, resulting in 44 applications. 6 members initially started on the committee, and in fall 2022, an additional 5 individuals joined.
- Since winter 2022, 16 meetings of the community choice grants program design and review committee to help shape the [community choice grants guidebook for project solicitation](#).
- Ongoing work with a community engagement consultant team to help develop the community choice grants pilot community engagement approach and activities with a focus on ensuring as many community members as possible in Metro Council District 4 have a chance to get engaged and weigh in on which projects will receive funding.
- Collaboration with park providers in Western Washington County including Tualatin Hills Park and Recreation District, Washington County and the cities of Beaverton, Forest Grove, Hillsboro and Cornelius.

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

<b>Category</b>	<b>During calendar year 2022</b>
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**

In early 2023, the team finalized a program handbook and launched an initial solicitation for the bond's Nature in Neighborhoods capital grants program. Parks and Nature staff aims to have a funding recommendation for Metro Council consideration and approval by summer 2023. After this initial funding round, the capital grants team plans to compile lessons learned and update the program handbook as needed before subsequent solicitations.

The Nature in Neighborhoods Community Choice grants officially launched in March 2023 with information sessions and idea generating events.

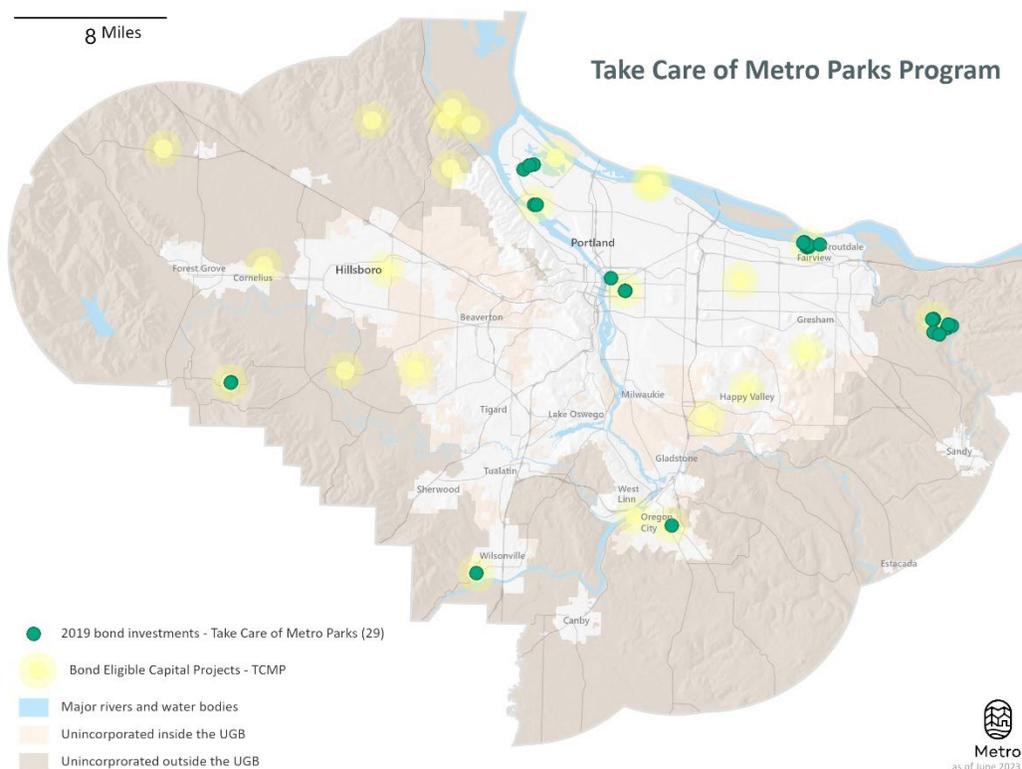
## TAKE CARE OF METRO PARKS

**\$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 invested over \$9 million in bond funding 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**



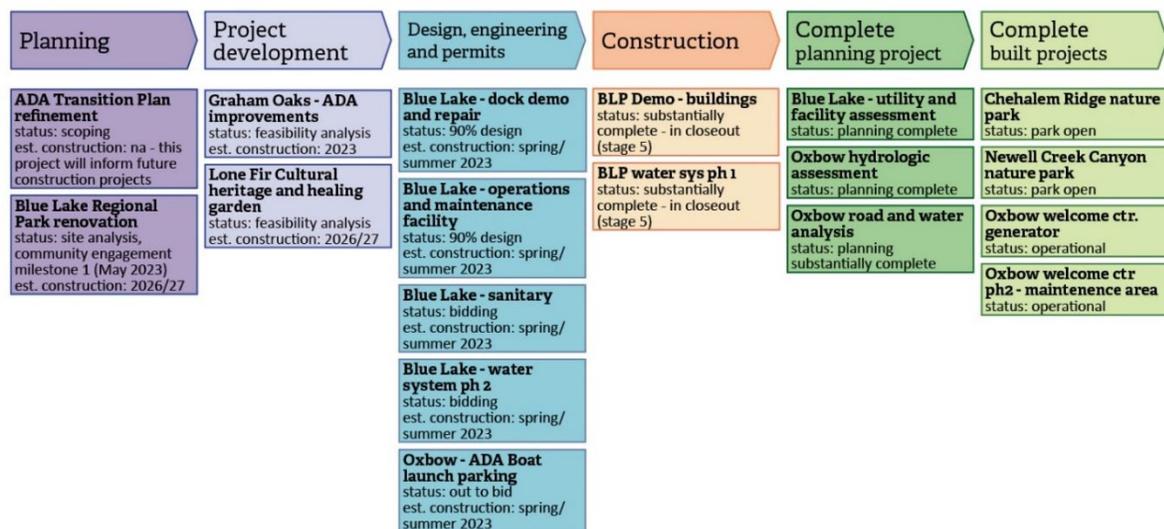
### **Take care of Metro parks program milestones completed as of December 2022:**

- 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.
- Launched engagement activities for the Lone Fir Cemetery Cultural Heritage and Healing Garden with members of Chinese and Chinese American communities.
- 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 projects must be capital projects (including real estate acquisitions) owned by a public agency, meaning a building, facility, property or large natural area restoration and must meaningfully engage with communities of color, Indigenous communities, people with low incomes and other historically marginalized communities in planning and development.

In spring 2022, the Metro Council approved a [pilot program handbook](#) to launch a pilot round of up to \$10 million for projects that cost at least \$6 million and are devoting at least \$2 million of that to habitat restoration. The Metro Council and staff are planning to conduct two future solicitations and will compile lessons learned from this pilot round to identify potential adjustments to the program handbook as needed.

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

- Launched pilot solicitation of up to \$10 million.
- Broad outreach about solicitation through Metro’s website, bond newsletter and sharing with interested parties list as well as meetings with 10 potential partners around the region to solicit interest and assess project compatibility.
- Received four letters of intent in fall 2022 and met with each entity:
  - Trust for Public Lands/Oregon State University for a land acquisition in the Tualatin Mountains area
  - Portland Botanical Gardens – Site acquisition on the Willamette River near Willamette Cove
  - Oregon Museum of Science and Industry/Columbia River Intertribal Fish Commission and Prosper Portland for Waterfront Education Park and OMSI district catalyst on the Willamette River
  - Albina Vision Trust for development of site acquisition adjunct to Willamette River

### 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 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.

Three of the projects submitted detailed applications Council consideration and approval of an initial funding round in spring 2023.

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

- Number of award designations made by the Metro Council in the pilot round
- Status of completed funding agreements for awardees from the pilot round
- Outreach to solicit letters of interest for future rounds
- Reporting from large scale community visions program grant recipients on how they're advancing bond criteria in project development, advancement and activation
- Feedback from entities that submitted letters of intent and applications on the experience of participating in the pilot round

## 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 reporting tools and frameworks to evaluate the impact of bond investments and activities over the life of the bond on the well-being of people and place across the region.
- Preparation to invest bond funds on Americans with Disabilities Act (ADA) improvements across Metro’s portfolio and to leverage bond funded projects to track and improve participation of women and Black, Indigenous, and people of color in the construction trades.

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.

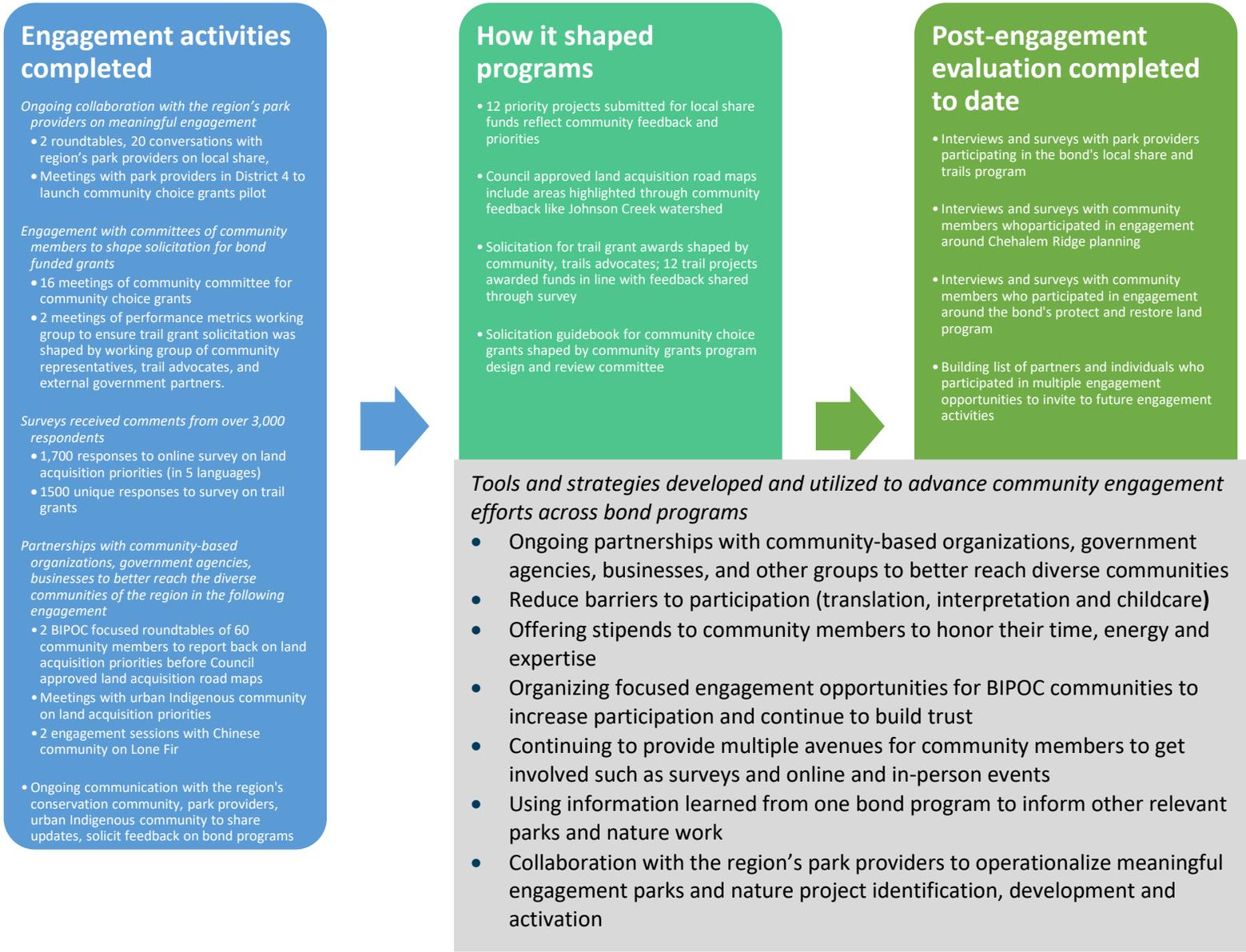
### List of parks and nature bond community engagement and racial equity criteria

<ul style="list-style-type: none"> <li>• Meaningfully engage with communities of color, Indigenous communities, people with low incomes and other historically marginalized communities in planning, development and selection of projects.</li> </ul>
<ul style="list-style-type: none"> <li>• Prioritize projects and needs identified by communities of color, Indigenous communities, low income and other historically marginalized groups.</li> </ul>
<ul style="list-style-type: none"> <li>• 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.</li> </ul>
<ul style="list-style-type: none"> <li>• Improve the accessibility and inclusiveness of developed parks.</li> </ul>
<ul style="list-style-type: none"> <li>• Include strategies to prevent or mitigate displacement and/or gentrification resulting from bond investments.</li> </ul>

- 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 [exhibit 4](#).



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

This snapshot describes work completed in 2021 and 2022 to launch the community choice grant program, which 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 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, which includes a pilot at Graham Oaks Nature Park to address barriers to access and 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.
- Planning for [ADA improvements to Oxbow boat launch](#) 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.*

- While this criteria is one that extends beyond the Parks and Nature sphere of responsibility, Parks and Nature staff have identified markers to demonstrate progress including 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 on programs or processes that allow community to shape investments directly. The [Community Choice grants pilot](#) in Metro Council District 4 will provide an opportunity for a specific community to help identify, shape and select project priorities through piloting participatory budgeting principles. The pilot round of solicitation for the large scale community visions program, intended to support community driven catalytic projects, 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 parks and nature bond funded contracts in alignment with agency-wide priorities and protocol and to exceed the floor of 20 percent COBID participation across bond funded projects. The current COBID participation rate for bond funded projects is 38 percent. Parks and Nature staff working on several bond programs have encouraged prime contractors to partner with COBID certified firms as sub-contractors.
- In 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

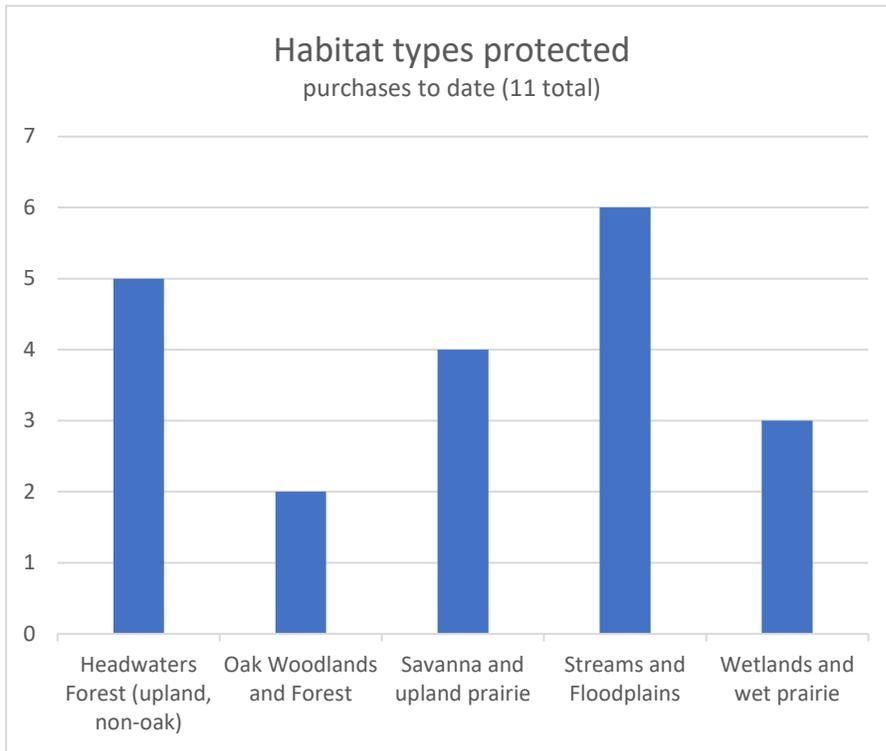
### List of parks and nature bond's climate resilience criteria

<ul style="list-style-type: none"><li>• Protect, connect and restore habitat to support strong populations of native plants, fish and wildlife that can adapt to a changing climate</li></ul>
<ul style="list-style-type: none"><li>• Protect and restore floodplains, headwaters, streams and wetlands to increase their capacity to handle stormwater to protect vulnerable communities from flooding.</li></ul>
<ul style="list-style-type: none"><li>• Increase tree canopy in developed areas to reduce heat island effects.</li></ul>
<ul style="list-style-type: none"><li>• Use low-impact development practices and green infrastructure in project design and</li></ul>
<ul style="list-style-type: none"><li>• Invest in segments of the regional trail system to expand active transportation opportunities for commuting, recreation and other travel.</li></ul>

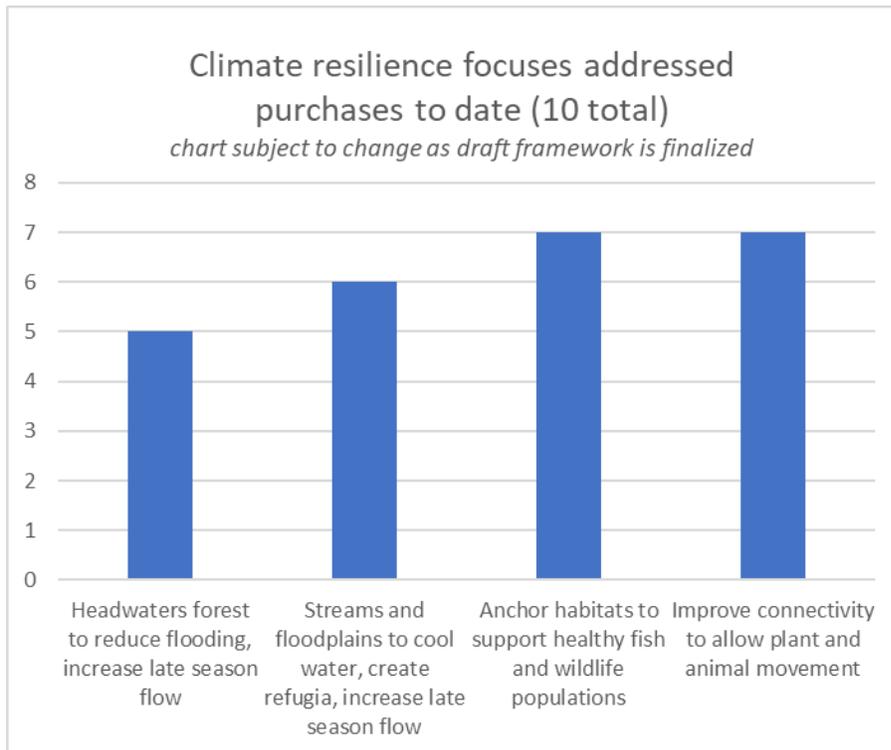
### *Tools and strategies developed in 2022 that help advance climate resilience criteria listed above*

- Evaluating the bond's progress on climate resilience is complicated and challenging as each of the six bond programs addresses the climate resilience criteria differently. Climate resilience is complex and many factors across the region interact together to build it and detract from it.
- The protect and restore land's acquisition activities, which represent significant investment with benefits to regional climate resilience, is built on key scientific assumptions about relationships between the act of protecting and restoring land and ripple benefits that may have across the region on factors that underpin climate resilience such as habitat connectivity, water quality and quantity and preserving anchor habitats.
- Metro is a piece of the larger puzzle. Science tells us that specific actions can have ripple impacts in the region, but it's hard to isolate, measure and quantify Metro's specific impact on regional climate resilience.
- In 2022, staff developed and reviewed with the oversight committee a framework and results chain that connects bond funded land acquisition activities to the bond's climate resilience criteria by evaluating each land acquisition's alignment with one or more of climate resilience factors (figure 3 and exhibit 7 in the [appendix](#)) as well as the data used by staff to screen each potential land acquisition for alignment with bond climate resilience criteria. The committee began to engage and advise staff on strategies to effectively communicate these connections.
- 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 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.
- 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.

**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 \$42.2 million of bond proceeds available and has awarded \$24.8 million through trail grants and local share with a current administrative rate of about 23.6 percent of total bond spending to date or about \$9.9 million. 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**

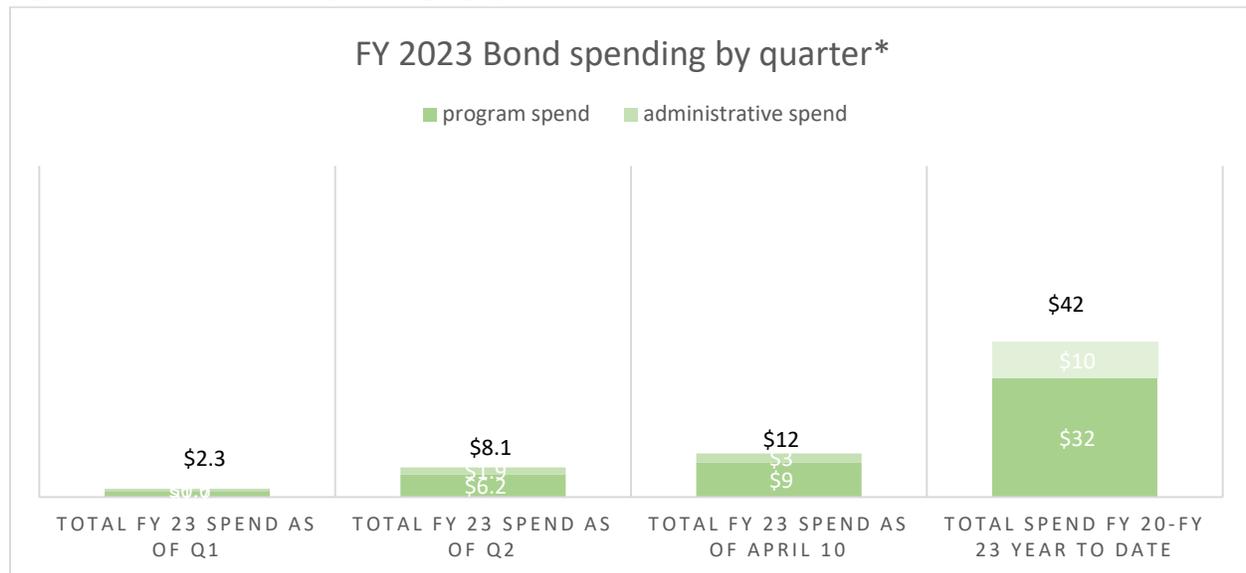
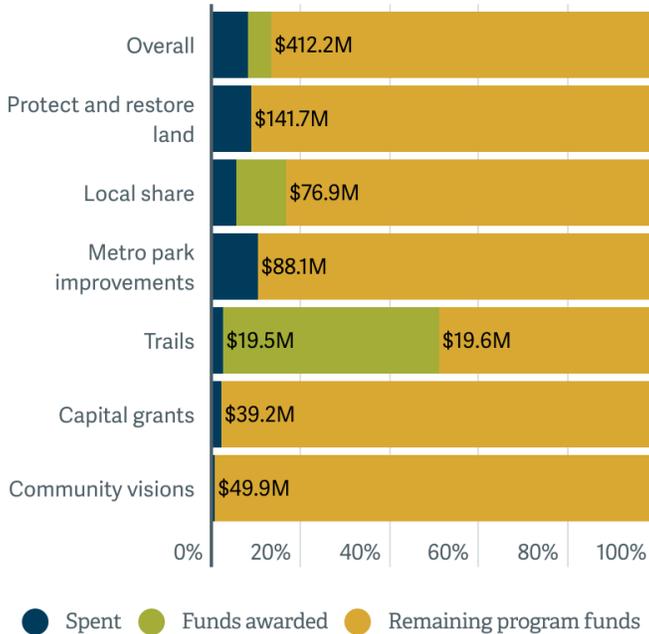


Figure 2, bond spend by program area as of March 2023

# Bond spending

\$62.8 million had been spent or awarded to projects by March 31, 2023.



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 spending and bond funded awards 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 spending 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

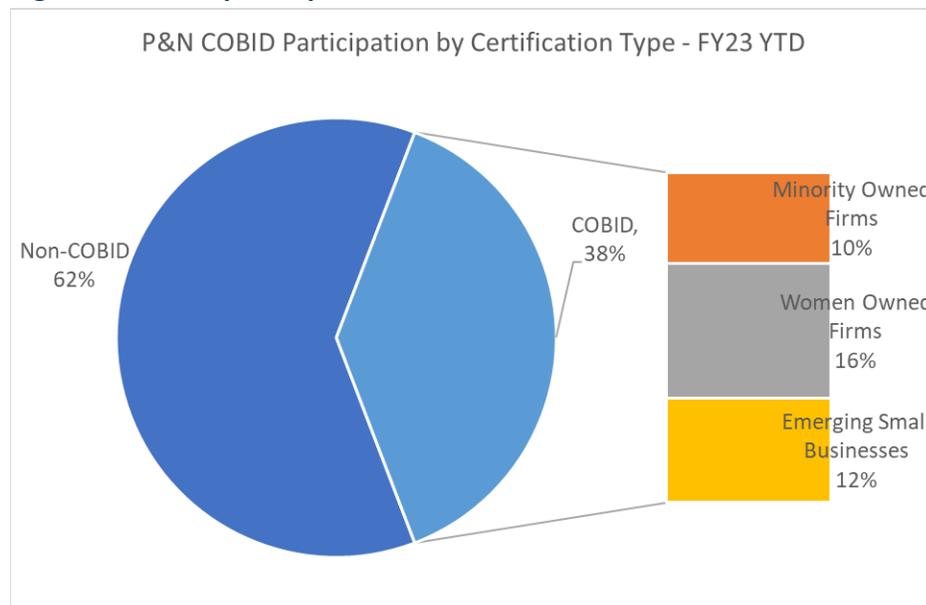
Metro tracks the percentage of bond spending with minority owned, women owned and emerging small businesses that are certified with [Oregon’s Certification Office for Business Inclusion and Diversity \(COBID\)](#). In addition, Metro tracks the spending percentage with each type of COBID certification (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
<b>Protect/Restore</b>						
Personnel	8,897	1,027,574	1,318,586	1,554,304	3,909,361	
M&S or Capital	120,063	843,385	5,104,935	4,885,760	10,954,143	
<b>Total</b>	<b>128,960</b>	<b>1,870,959</b>	<b>6,423,521</b>	<b>6,440,064</b>	<b>14,863,504</b>	<b>35.20%</b>
<b>Take Care of Metro Parks</b>						
Personnel	8,897	642,133	1,334,500	1,031,837	3,017,367	
M&S or Capital	221,847	3,051,112	2,279,728	2,108,813	7,661,501	
<b>Total</b>	<b>230,744</b>	<b>3,693,245</b>	<b>3,614,228</b>	<b>3,140,651</b>	<b>10,678,868</b>	<b>25.29%</b>
<b>Local Share</b>						
Personnel	29,397	213,678	240,033	203,101	686,209	
M&S or Capital	-	2,464	2,492,200	1,582,157	4,076,821	
<b>Total</b>	<b>29,397</b>	<b>216,142</b>	<b>2,732,233</b>	<b>1,785,258</b>	<b>4,763,030</b>	<b>11.28%</b>
<b>Grants</b>						
Personnel	12,847	184,414	240,528	318,618	756,407	
M&S or Capital	-	2,061	85,755	37,107	124,923	
<b>Total</b>	<b>12,847</b>	<b>186,475</b>	<b>326,283</b>	<b>355,725</b>	<b>881,330</b>	<b>2.09%</b>
<b>Trails</b>						
Personnel	8,489	243,278	233,358	270,596	755,721	
M&S or Capital	3,825	818	148,071	17,049	169,763	
<b>Total</b>	<b>12,314</b>	<b>244,096</b>	<b>381,429</b>	<b>287,645</b>	<b>925,484</b>	<b>2.19%</b>
<b>Community Visions</b>						
Personnel	-	3,480	121,359	16,779	141,618	
M&S or Capital	-	-	-	434	434	
<b>Total</b>	<b>-</b>	<b>3,480</b>	<b>121,359</b>	<b>17,213</b>	<b>142,052</b>	<b>0.34%</b>
<b>Total Program Spend</b>	<b>414,262</b>	<b>6,214,397</b>	<b>13,599,053</b>	<b>12,026,557</b>	<b>32,254,269</b>	<b>76.39%</b>
<b>Admin</b>						
Personnel	100,702	556,026	592,328	563,050	1,812,106	
M&S or Capital or Transfer	711,826	1,017,825	3,479,284	2,946,559	8,155,494	
<b>Total</b>	<b>812,528</b>	<b>1,573,851</b>	<b>4,071,612</b>	<b>3,509,609</b>	<b>9,967,600</b>	<b>23.61%</b>
<b>Total Bond Spend</b>	<b>1,226,790</b>	<b>7,788,248</b>	<b>17,670,665</b>	<b>15,536,166</b>	<b>42,221,870</b>	
Administrative Spending as a % of Total Bond Spend	66.23%	20.21%	23.04%	23%		23.61%

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

## APPENDIX

### EXHIBIT 1

#### **Parks and nature bond 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.

### EXHIBIT 2

#### **Parks and nature bond 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.

## EXHIBIT 3

### 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.

## EXHIBIT 4

### Summary of bond related engagement activities from 2018-2022

Community engagement activity (listed by date in ascending order)	Who was engaged	How feedback was used	Was there continuity from previous and subsequent bond engagement activities?	Use of post-activity evaluation to determine impact
2018-2019: forums and focus groups on bond development, stakeholder table convened to advise Metro on the development of the 2019 parks and nature bond	Park providers, community organizations, conservations organizations	<a href="#">Feedback captured during these events and activities</a> helped to shape focus for specific programs, the three bond criteria and focal areas in the bond measure approved by voters in 2019	Yes, participants included many who have engaged in previous Parks and Nature 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 and Portland Indian Leaders Roundtable	Reviewed and shaped data collected on each of the 24 target areas for the protect and restore land program; affirmed priorities for acquisition/restoration that benefitted salmon; prioritized specific geographies for acquisition	Yes, cohort of urban Indigenous community members have been engaging with Metro on multiple projects before and after	Yes; 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 Community Choice grants design and review <a href="#">pilot committee</a>	To shape <a href="#">the community choice grants solicitation guidebook</a> and project selection project	6 members were appointed in 2021; 4 have continued on into 2022 and an additional 5 have joined the committee	2 interviews conducted of members on their experience; future evaluation planned
Spring 2021: BIPOC-focused engagement sessions to shape priorities for trail gap acquisition.	Focused engagement session with 100 BIPOC community members who were invited to attend	<a href="#">Feedback shared</a> informed how to prioritize factors in the acquisition of future trail segments; like safety, connections to work or access to nature	Participants were invited to attend other engagement opportunities through bond refinement	no post event evaluation

Community engagement activity (listed by date in ascending order)	Who was engaged	How feedback was used	Was there continuity from previous and subsequent bond engagement activities?	Use of post-activity evaluation to determine impact
	through partnering with community organizations across the region			
Fall 2021: Report back/general community engagement sessions to shape priorities for trail gap acquisition	Individuals who participated in spring 2021	Report back on work completed to evaluate trail segments for prioritization and how feedback from the spring shaped staff work on prioritizing trail gaps	Yes, participants from the spring trail acquisition engagement events were invited	no post activity evaluation
Fall 2021-spring 2022: Performance measures working group	Representatives from the region's park providers, community organizations and trail advocates	Worked with staff to develop the solicitation for the bond funded trails grant and evaluation framework for applications	Yes, working group members were comprised of organizations working closely with Metro	No post activity evaluation
2021-2022: Groundtables for BIPOC and people with disabilities in fall 2021 and 2 follow up sessions in winter 2022 to help shape priorities for bond funded land acquisition (protect and restore land)	BIPOC community members, people with disabilities (160 attendees between fall and winter events); consultant conducted outreach across the region to invite individuals to attend	<a href="#">Feedback shared</a> helped identify priorities for land acquisition and restoration based on lived experience	Same individuals invited to participate in fall and winter focus groups; also have been invited to other engagement activities	No post activity evaluation
Winter 2022: Survey on priorities for land acquisition translated into five languages	Survey shared with individuals across the region; on Metro's website and shared on social media; 1700 unique responses received	Feedback shared helped affirm priorities for land acquisition road maps; shared with Council as they considered and approved final target area refinement plans	Not determined, though it is likely that many individuals already engaged took the survey	No post activity evaluation

Community engagement activity (listed by date in ascending order)	Who was engaged	How feedback was used	Was there continuity from previous and subsequent bond engagement activities?	Use of post-activity evaluation to determine impact
Summer 2022: Survey on priorities for trail grants translated into 5 languages	Survey shared with individuals across the region; on Metro's website and shared on social media; 1500 responses received	<a href="#">Feedback shared</a> was an input considered by the Metro Council as they reviewed and considered trail projects for grant funding	Not determined, though it is likely that many individuals already engaged took the survey	No post activity evaluation
Fall 2022: two engagement activities in November 2022 on <a href="#">Lone Fir Cultural Heritage and Healing Garden</a>	Members of Chinese and Chinese American communities. 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. PN staff have been connecting separately and individually with advocates for people with mental illness.	<a href="#">Participants shared</a> initial thoughts about overall project concept	A small work group has recently been assembled to provide input on project issues moving forward.	No post activity evaluation

## EXHIBIT 5

### Detailed snapshot of progress on community engagement and accessibility by bond program in 2022

	Community engagement efforts completed to date	Community engagement outcomes measured to date	Community engagement 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: Initial 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 prior to 2019 now that the nature park is open (12 qualitative interviews, 14 quantitative survey)</p>	<p>Interviews and surveys of individuals who will engage in upcoming activities around the Blue Lake Park renovation project</p>
<b>Local share</b>	<p>Ongoing: Metro staff continue to provide support to park providers working to engage marginalized communities in project selection, development or site</p>	<p>Bond evaluation outcomes project interviewing park providers on impact of community engagement efforts to date (24 qualitative interviews, 9 quantitative survey)</p>	<p>Metro requires local share recipients to conduct community engagement as part of their projects and their annual reports will summarize efforts on engagement and accessibility.</p>

	<b>Community engagement efforts completed to date</b>	<b>Community engagement outcomes measured to date</b>	<b>Community engagement reporting efforts to come</b>
	activation both through roundtables and one on one conversations	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> )	Follow up with park providers on community engagement efforts related to local share projects in future years
<b>Trails</b>	<p>Fall 2021-spring 2022: Trail grant solicitation was shaped by performance metrics working group of community representatives, trail advocates, and external government partners.</p> <p>Summer 2022: Online survey (translated into 5 languages) on trail projects for funding received 1,798 project-specific comments from 1,551 unique respondents.</p>	<p>Survey responses were considered in trail grant project selection.</p> <p>Performance metrics working group membership and participation from community-based organizations helped shape grant solicitation process</p> <p>Bond evaluation outcomes project interviewing park providers on impact of participating in trail grants program to date (24 qualitative interviews, 9 quantitative survey)</p>	<p>Metro requires grantees to conduct community engagement as part of their projects. Grantees’ annual reports will summarize engagement efforts.</p> <p>Follow up with park providers on community engagement efforts related to trail grant projects in future years</p>
<b>Capital grants</b>	<p>Fall 2021: outreach to recruit community members to join the community choice grants program design and review committee (see community choice grants case study)</p> <p>Winter 2021-spring 2022: deep engagement with community choice grants program design and review committee to develop the program</p>	Community choice grants program handbook reflects the values and priorities of the program design and review committee and is aligned with bond and program criteria	<p>Interviews/surveys of individuals participating in community choice grants process in 2023 and beyond</p> <p>Projects (type, location) selected through the community choice grants in 2023</p>

	<b>Community engagement efforts completed to date</b>	<b>Community engagement outcomes measured to date</b>	<b>Community engagement reporting efforts to come</b>
	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  Feedback from applicants during the pilot round will help staff refine and adjust future solicitations

## EXHIBIT 6

### Snapshot of progress made on bond racial equity criteria by bond program in 2022

	Efforts completed to date	Outcomes measured to date	Reporting efforts to come
<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 contracting requirements and Construction Career Pathways Framework requirements for diverse workforce participation apply to local share projects</p>	<p>Bond evaluation outcomes project interviewing and surveying park providers working on local share 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> <p>Follow up with park providers on efforts related to advancing racial equity through investments in parks, trails and natural areas in future years</p>
<b>Trails</b>	<p>Match requirements for trail grants prioritized equity focal</p>	<p>Bond evaluation outcomes project interviewing and surveying park providers working on trail grants</p>	<p>Mapping of trail projects awarded across the region overlaid with equity focal areas</p>

	<b>Efforts completed to date</b>	<b>Outcomes measured to date</b>	<b>Reporting efforts to come</b>
	<p>areas<sup>1</sup> within a mile of the project</p> <p>COBID contracting requirements and Construction Career Pathways Framework requirements for diverse workforce participation apply to construction projects funded by trail grants</p>	<p>on efforts related to advancing racial equity through investments in parks, trails and natural areas</p>	<p>Projects that receive funding will be asked to report on activities related to advancing racial equity</p> <p>Follow up with park providers on efforts related to advancing racial equity through investments in parks, trails and natural areas in future years</p>
<b>Nature in Neighborhoods (Community Choice grants and capital grants)</b>	<p>Focus of community choice grants in underserved neighborhoods of District 4</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>

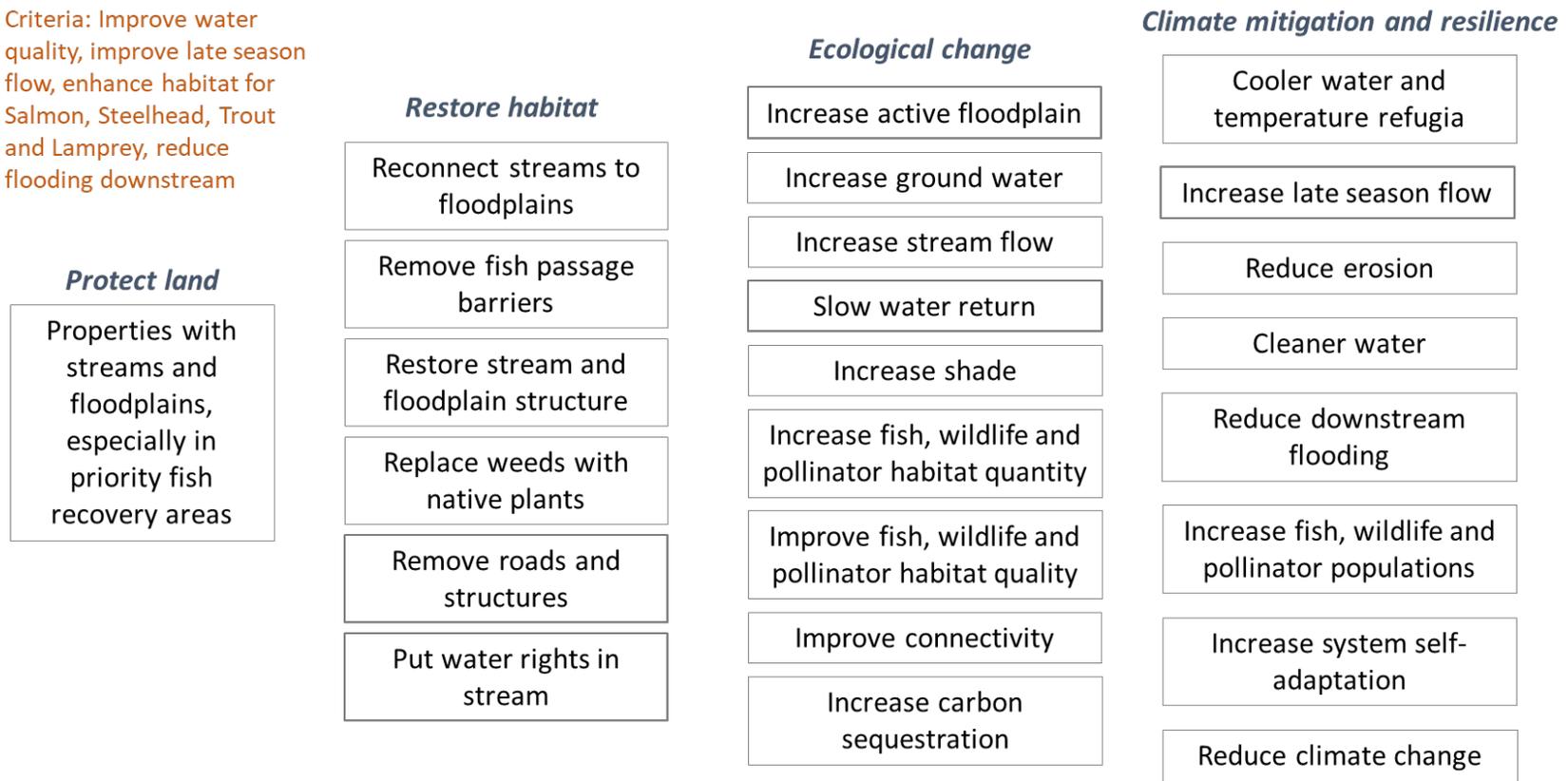
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<sup>1</sup> Defined as census tracts that represent communities where the rate of Black, Indigenous, or People of Color (BIPOC), people with limited English proficiency (LEP), or people with low income (LI) is greater than the regional average. Additionally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

## EXHIBIT 7

### Example results chain of land protection and restoration to the bond's climate resilience criteria on water quality

- Criteria: Improve water quality, improve late season flow, enhance habitat for Salmon, Steelhead, Trout and Lamprey, reduce flooding downstream



## EXHIBIT 8

### Overview of oversight committee discussions and requests for information in calendar year 2022

As part of its regular oversight and reviewing role, the Natural Areas Oversight 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 are complete, goal is to improve at each meeting	Reserve more space at committee meetings for discussion, not staff presentation.  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.
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.

Question/topic/request for information	Date	Status or next steps	Staff response to date
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.  Parks and Nature staff continue to refine closing memo and can consider how

Question/topic/request for information	Date	Status or next steps	Staff response to date
			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 to contractors or sub-contractors?	February 2023	Complete for now, but staff will continue to update committee on this topic	Staff clarified that right now we have capacity only to track COBID 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	Parks and Nature bond has a community engagement framework, which

		the community engagement framework	<p>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 in 2022 staff report	<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 Blue Lake Park engagement activities</p>

			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>

## **EXHIBIT 9**

**Initial evaluation framework for the bond, developed and refined in 2022**



## Evaluation framework - Executive summary

# Parks and Nature Bond

In November, 2019, voters across greater Portland approved Metro's 2019 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 is comprised of six program areas:

1. Protect and restore land, \$155 million
2. Local parks and nature projects (local share), \$92 million
3. Nature in Neighborhoods capital grants, \$40 million
4. Metro park improvements, \$98 million
5. Walking and biking trails, \$40 million
6. Large-scale community visions, \$50 million

Metro will work closely with a range of partners — local park providers, tribal governments, conservation partners, urban Indigenous community and other community members — to plan and advance bond investments. These investments, made throughout the life of the bond, will include improvements at beloved places such as Oxbow and Blue Lake regional parks, acquisition of natural areas, and restoration of habitat and local parks, trails, and natural areas close to where people live. Investment decisions will be shaped by the people of greater Portland, particularly people of color and other historically marginalized communities who have not benefited equitably from past investments. This work will strengthen Metro's unique parks and nature system, advance racial equity and improve regional climate resilience while centering nature.

### **Racial equity and climate resiliency criteria**

To ensure that bond investments advance racial equity and make communities and natural areas more resilient to climate change, the Metro Council established a set of requirements in the bond measure for the program areas to address. These requirements are called the bond criteria and include a mix of actions and desired outcomes.

To monitor progress toward satisfaction of each criterion, Metro's Parks and Nature Department has initiated an evaluation process that will build upon and broaden current efforts to report on specific investments in parks, trails and natural areas. This process will clarify what satisfaction of each criterion may entail, determine data that will indicate whether each program area is on track to address each

criterion, gather data to determine progression, and analyze the data to understand the wider impacts that the bond has had in the region beyond the criteria.

For example, to understand how bond funded investments help improve the accessibility and inclusiveness of Metro's developed parks such as Blue Lake and Oxbow Regional Park, this project will help staff collect data about both the investments made to meet or exceed ADA accessibility standards, interview community members who help shape site investments to understand how they see themselves reflected in the work and survey and interview users of Metro's parks to understand if investments made do help increase accessibility in all its dimensions.

### Impact evaluation

Evaluation goes beyond data collection; it is an effort to learn, to discover, and to respond. The value of the parks and nature bond measure is seen most clearly in the effects on natural spaces

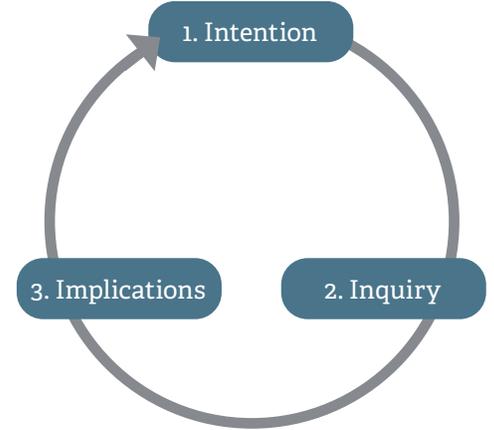
and communities. To reveal the true value of the bond requires an evaluation of impact and progress toward that impact – not just the investments made, but the difference made through the investments and programs. It also requires a clear understanding as to why we believe the effort (what we do) will ultimately lead to the desired impact. This is known as a theory of change.

Therefore, the multi-year and ongoing evaluation process focuses on impact and involves three phases (Image to the right):

Phase 1: Intention\* – Clarify the intention and Theory of Change for the bond criteria, and build an impact framework (this document) that guides each program area to develop indicators and metrics.

Phase 2: Inquiry\*\* – Finalize indicators and metrics to measure intention, develop approaches and instruments to gather data, analyze data, and identify the themes and findings from the data.

### 3 phases of the evaluation process



Phase 3: Implications – Consider the ramifications of the data and determine, in dialogue with the community, how the discoveries of the evaluation should inform steps forward.

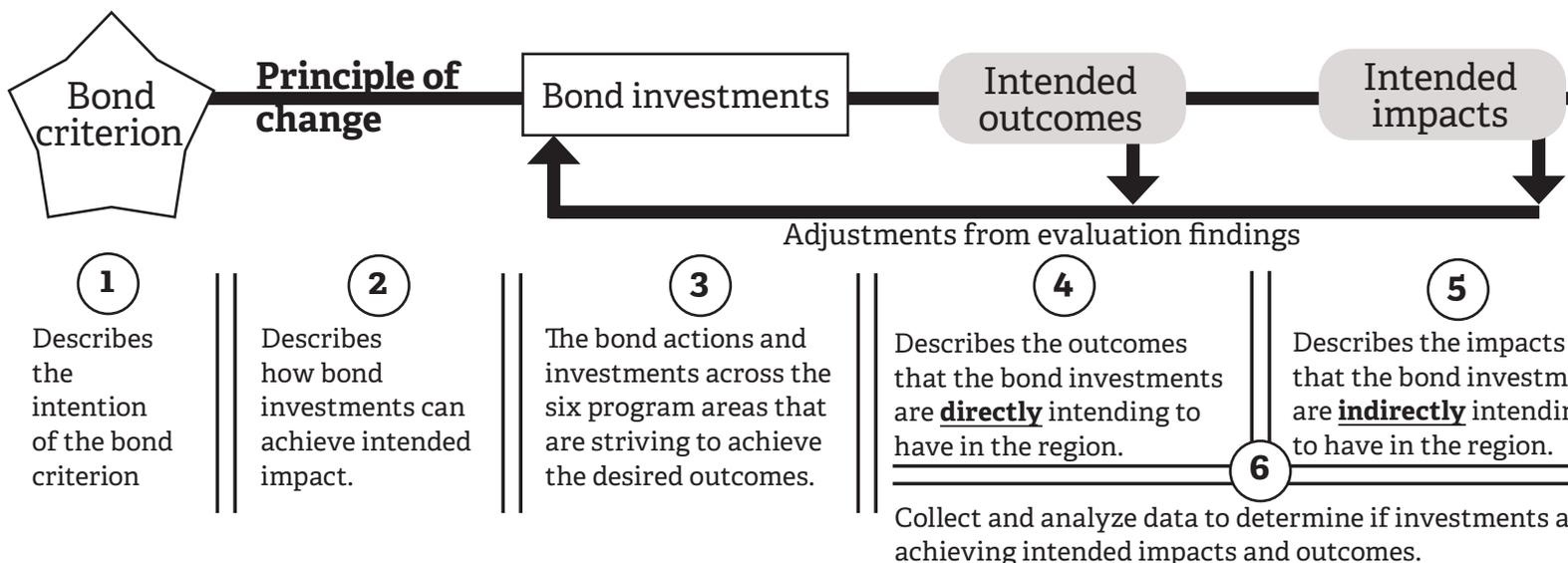
\*Parks and Nature staff completed Phase 1 in late 2021.

\*\* Phase 2 will occur between January and September 2022.

## Evaluation framework

Effort

Monitor progress



## Community engagement and racial equity criteria

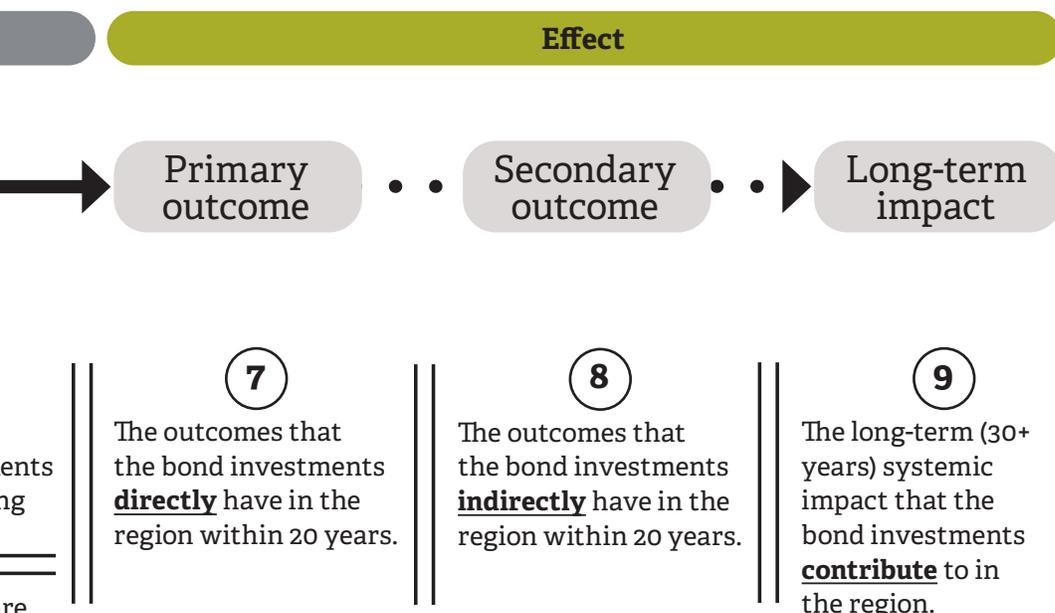
Program areas must address all of the following:

- 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

Projects must address one of 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.



## Evaluation Framework

The image to the left outlines the evaluation framework for Metro's parks and nature bond measure. It provides a high level overview of the relationship between the bond program areas and their investments to satisfy each bond criterion (effort). It also highlights the importance of clearly articulating the intended outcomes and impacts (effects) from the bond investments in order to monitor and adjust bond investments so that they continually progress toward satisfaction of the criteria.

# Essential elements

The table below outlines the principles of change, bond outcomes, and long-term impacts for the 2019 Parks and Nature bond. These elements are the essential building-blocks for the evaluation of Metro's successful satisfaction of the bond

Bond Criteria	Principle of Change	Primary Outcomes
Description of how bond investments should be made to advance racial equity and make the region more resilient to climate change.	Description of how and why intended outcomes and impact is expected to happen through the work outlined in the criterion.	These are the direct effects investments on people, community and environment. We expect to see these outcomes in the region.
Meaningfully engage with communities of color, Indigenous communities, people with low incomes and other historically marginalized communities in planning, development and selection of projects.	Meaningful engagement leads to co-creation.	Protected lands establish the habitat for prioritized plants and improved hydrologic function and improved habitat connectivity and resiliency. (PRL)
Prioritize projects and needs identified by communities of color, Indigenous communities, low-income and other historically marginalized groups.	Prioritizing historically marginalized communities addresses historic disinvestment and entrenched barriers to provide all communities with the opportunity to enjoy full benefit of an investment.	Community members, especially Black, and other people of color have not been served equitably. (PRL)
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.	Accountability to outcomes leads to greater trust in government from community.	Communities and partners excluded from government decisions have not been served equitably. Investments are engaged and funded decisions. (PRL, CG)
Improve the accessibility and inclusiveness of developed parks.	Accessibility and inclusiveness lead to increased use of the region's parks and natural spaces and a greater sense of community ownership.	Local jurisdictions strengthen engagement capacity so that partners who have been excluded from decisions and who have not benefited equitably by past bond investments are engaged and influential in bond funding decisions. (Trails)
Include strategies to prevent or mitigate displacement and/or gentrification resulting from bond investments.	Meaningfully engaged communities leads to better informed decisions at Metro that account for and address community conditions.	Park visitors' expectations are met and they feel welcome and valued.
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.	Prioritizing workforce and contractor equity leads to prosperity of BIPOC contractors, workers and communities, while also enhancing how parks and natural spaces are managed.	Community members care for their neighborhoods and stewardship habits. (CG)
Protect, connect and restore habitat to support strong populations of native plants, fish and wildlife that can adapt to a changing climate.	Protecting, connecting, and restoring habitat and natural processes on priority lands leads to increased ability of species to self-adapt to changing environmental conditions.	Certification Office for Business and Diversity (COBID)-certified non-profit organizations and workforce benefit from economic development contracted for bond project.

criteria. The progress toward the bond outcomes are what will be measured by Metro staff because these outcomes are anticipated to occur as a result of the criteria-directed bond investments and if achieved, together they will contribute to the set of long-term impacts.

	Secondary Outcomes	Bond Long-term Impact
<p>of the bond communities, and the to see evidence of on within 20 years.</p>	<p>This is what happens as the primary outcomes take hold and begin to influence and change people and contexts. We expect to see evidence of these outcomes in the region within 20 years.</p>	<p>Description of the intended long-term (30+ years) systemic impacts that the bond outcomes <b>contribute</b> to in the region.</p>
<p>the basis for improved s and animals, im- and water quality, ectivity and climate</p> <p>cially of Indigenous, olor, have more in- ss to land and water</p> <p>who have been al decisions and who ably by past bond nd influential in bond TCMP)</p> <p>en their community t communities and eluded from govern- ave not been served stments are engaged ded decisions. (LS,</p> <p>and basic needs are and safe. (TCMP)</p> <p>for natural areas develop long-term</p> <p>ness Inclusion ified contractors, d a diverse work- c opportunities when s. (PRL, CG, TCMP)</p>	<p>Improved habitat for organisms, improved water quality and watershed function, increased connectivity and resiliency at multiple scales. (PRL, LS, CG)</p> <p>The climate and ecosystem impacts of construction, capital improvements and repair at Metro parks is reduced. (TCMP)</p> <p>Indigenous communities experience opportunities to enhance and pursue traditional lifeways. (PRL)</p> <p>Communities are connected to the heritage, traditions, and history of the natural land where they live, work, and play. (PRL)</p> <p>Historically marginalized communities experience a sense of ownership and agency by guiding the selection, design, implementation, and management practices of bond funded parks, nature-based projects, and natural areas. (PRL, LS, CG)</p> <p>Community members see their culture, traditions, and values affirmed and reinforced in their trail network. (Trails)</p> <p>Members of historically marginalized communities experience public investments in parks and nature in their own communities. (LS)</p> <p>Members of historically marginalized communities see value in supporting public bonds. (LS)</p> <p>Local partner agencies and community partners use investments in parks and natural areas to address long-standing disparities for historically marginalized groups. (LS, Trails, CG)</p>	<p>Historically marginalized communities are co-creators of the evolving regional parks and nature system.</p> <p>Everyone in the region experiences the full health benefit from Metro’s parks and natural areas.</p> <p>Historically marginalized communities experience a reduction in systemic barriers through their relationship with Metro.</p> <p>Metro park users of all cultures, ages and abilities can access a variety of nature experiences to strengthen their relationship to the natural world.</p> <p>The region’s parks and nature projects are community and neighborhood anchors that attract other amenities and help keep a community in place.</p> <p>People of color and women experience economic and occupational prosperity through the conservation and outdoor recreation economies.</p> <p>Native plants, fish and wildlife in the Metro region can self-adapt to a changing climate.</p>

# Essential elements

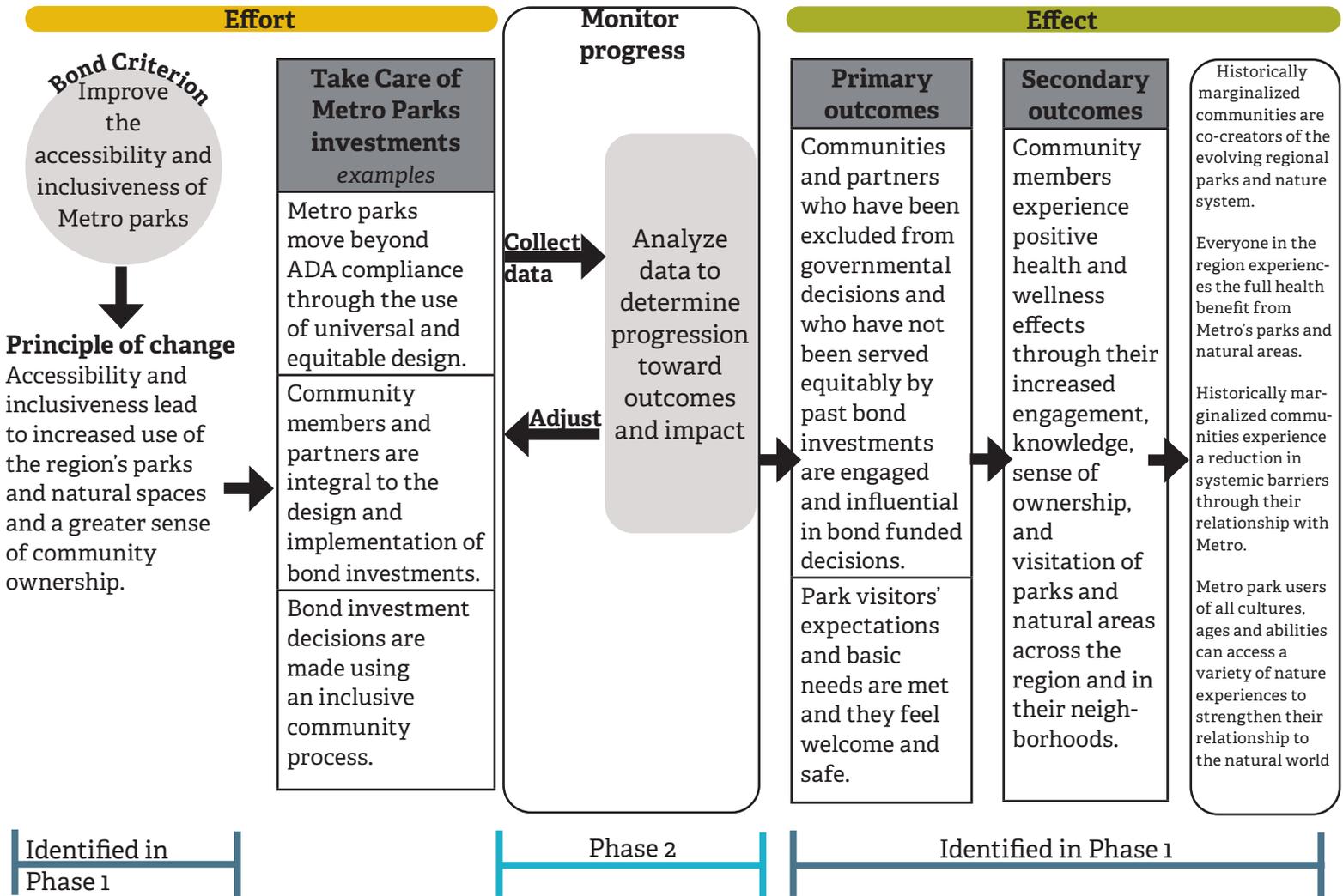
The table below outlines the principles of change, bond outcomes, and long-term impacts for the 2019 Parks and Nature bond. These elements are the essential building-blocks for the evaluation of Metro's successful satisfaction of the bond

Bond Criteria	Principle of Change	Primary Outcomes
Description of how bond investments should be made to advance racial equity and make the region more resilient to climate change.	Description of how and why intended outcomes and impact is expected to happen through the work outlined in the criterion.	Description of the intended outcomes that will occur in the region within the region as a result of bond investments.
Protect and restore floodplains, headwaters, streams and wetlands to increase their capacity to handle stormwater to protect vulnerable communities from flooding.	Improving watershed health and removing impervious surfaces from floodplains vulnerable to flooding leads to improved natural management of flooding and a reduction in flood impact on people.	Local jurisdictions create opportunities for Certification Office and Diversity (COBID)- and a diverse workforce to hire local contractors and other bond-funded projects. (LS, Trails)
Increase tree canopy in developed areas to reduce heat island effects.	Planting trees leads to a reduction in heat islands.	Community members in parks and neighborhoods experience increased access to natural areas. (CG)
Use low-impact development practices and green infrastructure in project design and development.	Integrating elements into developed structures that uplift and enhance the natural environment at the region's parks and natural areas can lessen the climate impact of these buildings and reduce harm to surrounding wildlife	Construction, capital improvements and other projects at Metro parks advance climate resilience and promote best practices. (TC)
Invest in segments of the regional trail system to expand active transportation opportunities for commuting, recreation and other travel.	Increased use of an expanded trail system leads to decreased vehicular trips and improved health and well-being of trail users.	Local partner agencies and Metro build the capacity to improve active transportation systems in alignment with local strategies and best practices.
		<p>Local jurisdictions and partner agencies invest in parks and natural areas. (CG)</p> <p>Community members use a regional system of walking and biking modes of transportation. (TC)</p> <p>Local park agencies are continuing to learn from a variety of opportunities in advancing and supporting projects. (LS, Trails)</p> <p>Local jurisdictions benefit from land acquisition negotiations. (Trails)</p>

criteria. The progress toward the bond outcomes are what will be measured by Metro staff because these outcomes are anticipated to occur as a result of the criteria-directed bond investments and if achieved, together they will contribute to the set of long-term impacts.

	Secondary Outcomes	Bond Long-term Impact
<p>and outcomes that will occur within 20 years as a <b>direct</b> result of the bond investments.</p>	<p>This is what happens as the primary outcomes take hold and begin to influence and change people and contexts. We expect to see evidence of these outcomes in the region within 20 years.</p>	<p>Description of the intended long-term (30+ years) systemic impacts that the bond outcomes <b>contribute</b> to in the region.</p>
<p>Economic opportunities for Business Inclusion and Diversity (BID)-certified contractors benefit from park bond investments.</p> <p>Workforce-deficient neighborhoods gain access to nearby parks and natural areas.</p> <p>Investments in parks and natural areas improve resilience and community health (TCMP)</p> <p>Community groups experience improved local natural climate resilience (LS, CG)</p> <p>Partners strengthen connectivity as it applies to parks and natural areas. (LS, Trails, Trails)</p> <p>Partners strengthen an interconnected system of walking and biking trails as it applies to parks and natural areas (Trails)</p> <p>Partners strengthen connected with and partners and supporting bond investments from Metro's strategic goals for public benefit.</p>	<p>All visitors to parks and natural areas in local jurisdictions feel welcomed, safe, and have their basic needs met. (LS)</p> <p>More Certification Office for Business Inclusion and Diversity (COBID)-certified contractors, non-profit organizations, and contractors that intentionally recruit, track and employ a diverse workforce see Metro as a viable potential client and are awarded more parks contract. (PRL, LS, Trails, CG, TCMP)</p> <p>The workforce that designs, improves, builds and maintains parks and natural areas, including Metro staff and those employed by contractors, reflects the diversity of the region and people who use the parks. (LS, Trails, TCMP)</p> <p>Community members depend on the interconnected regional system of walking and biking trails for transportation and connecting with nature. (Trails)</p> <p>Community members have more non-auto oriented modes of travel. (Trails)</p> <p>Community members experience positive health and wellness effects through their increased engagement, knowledge, sense of ownership, and visitation of parks and natural areas across the region and in their neighborhoods. (TCMP, CG)</p>	<p>Communities in the Metro region are less vulnerable to flooding.</p> <p>Urban heat islands in the Metro region are reduced.</p> <p>Developed investments in the region's parks and natural areas integrate and strengthen ecosystem function and integrity.</p> <p>Community members experience improved health and well-being through an increase use of active modes of travel.</p>

# Framework in action (example) - Take Care of Metro Parks



The image above shows the application of the “improve the accessibility and inclusiveness of Metro parks” bond criterion using the evaluative framework, focused on the Take Care of Metro Parks bond program area. Employing the theory of change, identified during phase 1, the Take Care of Metro Parks program area will invest funds to advance accessibility and inclusiveness to best reach the desired direct impacts (also identified during phase 1).

Phase 2 will involve the identification, collection and analysis of data to determine whether the bond investments are progressing toward the identified primary bond outcomes.

Phase 3 will then involve the determination, in dialogue with the community, of how the discoveries of the evaluation should inform future investments to more effectively reach the desired primary outcomes.

Ultimately, achieving the primary outcomes will lead to several secondary outcomes as well contribute to the long-term regional outcome that all people receive value and benefit from Metro parks.

