

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF APPROVING THE	)	RESOLUTION NO. 22-5269
PARKS AND NATURE BOND LARGE SCALE	)	
COMMUNITY VISIONS PROGRAM	)	Introduced by Chief Operating Officer
HANDBOOK	)	Marissa Madrigal in concurrence with
	)	Council President Lynn Peterson

WHEREAS, the Metro Council has taken a leadership role in protecting water quality and natural areas in greater Portland and providing access to nature for people through an interconnected system of parks, trails and natural areas; and

WHEREAS, on June 6, 2019, the Metro Council referred to the Metro area voters a ballot measure authorizing the issuance of general obligation bonds in an amount not to exceed \$475,000,000.00 for the purpose of funding natural area and water quality protection and to connect people to nature close to home (the “Bond Measure”); and

WHEREAS, at the general election held on November 5, 2019, the Metro Area voters approved the Bond Measure, thereby creating a program under which a portion of the total Bond Measure proceeds would be allocated to funding large-scale projects that uplift communities by leveraging nature to achieve benefits such as job opportunities, affordable housing and safe, reliable transportation (referred to hereafter as the “large scale community visions program” or the “Program”); and

WHEREAS, the Bond Measure requires the Metro Council to designate a proposal and project review process for the large scale community visions program; and

WHEREAS, Metro staff has drafted a large scale community visions program handbook (the “Handbook”) that identifies the types of organizations eligible to apply for the initial cycle of Program funding, criteria for investments, a process for project review and selection, and the desired outcomes for investments made; now therefore

BE IT RESOLVED, that the Metro Council hereby approves the criteria, processes and desired outcomes described in the Handbook attached hereto as Exhibit A and directs the Chief Operating Officer to implement the first cycle of funding for the Community Visions Program generally in accordance with the framework described in the Handbook.

ADOPTED by the Metro Council this 23<sup>rd</sup> day of June, 2022.



Christine Lewis, Deputy Council President

Approved as to Form:



Carrie MacLaren, Metro Attorney

STAFF REPORT: RESOLUTION NO. 22-5269, FOR THE PURPOSE OF APPROVING THE  
PARKS AND NATURE BOND LARGE SCALE COMMUNITY VISIONS PROGRAM  
HANDBOOK

---

Date: June 6, 2022  
Department: Parks and Nature  
Meeting Date: June 23, 2022

Prepared by: Brian Moore  
Presenter(s): Jon Blasher  
Length: 15 minutes

---

### **ISSUE STATEMENT**

On November 5, 2019, voters in greater Portland overwhelmingly approved a \$475 million parks and nature bond, creating a program under which a portion of the bond funds would be allocated to supporting large-scale projects that uplift communities by leveraging nature to achieve benefits such as job opportunities, affordable housing, and safe reliable transportation. The bond measure requires the Metro Council to designate a proposal and project review process for the large scale community visions program.

Staff has since prepared a pilot program handbook for the large scale community visions program (Exhibit A) that documents the goals and objectives of the program and establishes procedures to fund projects that meet the criteria of the program. This framework is intended to function as a pilot program, allowing staff, under the direction of Metro's Chief Operating Officer, to update and evolve the program in response to its effectiveness in the first year so that it may best serve the goals of the bond measure, Metro Council's direction and meet the needs of the community in the future.

Via Resolution, No. 22-5269, staff are presenting for Metro Council consideration and approval the pilot program handbook that articulates program structure, criteria, solicitation, and selection process. Council's approval of the pilot program handbook will allow staff to create a notice of funding availability (NOFA) to begin soliciting project ideas prior to fall 2022. Staff will work with Metro's Chief Operating Office to keep Metro Council updated on progress of the NOFA and projects that are submitted.

### **ACTION REQUESTED**

Staff requests Metro Council's adoption of resolution No. 22-5269, for the purpose of approving the large scale community visions pilot program handbook.

### **IDENTIFIED POLICY OUTCOMES**

Council direction has and will continue to shape the large scale community visions pilot program. The proposed program is developed from bond goals and objectives described in the 2019 parks and nature bond as well as program implementation experience gleaned from the 2019 bond's other grant and allocation programs. More detail about the proposed

program parameters can be found in Attachment A. Further, the program is intended to function as a pilot program that will be updated based on program successes and challenges in the first cycle.

Projects awarded under the program are expected to deliver on policy outcomes identified in the 2019 parks and nature bond which are to protect land and water and align with regional conservation goals, strengthen our region's climate resilience and benefit communities who haven't benefitted equitably from past investments. Projects awarded under this program will deliver significant capital investments that uplift communities by leveraging nature to improve jobs, housing, and safe transportation.

## **BACKGROUND**

The 2019 parks and nature bond indicate that "Metro Council will designate a proposal and project review process" related to the large scale community visions program. The community visions pilot program handbook combines bond criteria, program activities, and detail with additional requirements intended to achieve the broad goals identified through specific community driven capital projects.

Over the last several months, Council helped shaped a working definition of the large scale community visions program as one that invests in habitat, connection to nature, and green infrastructure that plays a key role in supporting a community driven vision for equitable redevelopment that better connects housing, transportation, and nature. Council also emphasized the importance of identifying projects that are geographically distributed around the region and projects that demonstrate a true commitment to creating natural area. In addition, Council has asked about opportunities to explore lower mandatory matches and an acknowledgement that there are significant risks in these kinds of projects. The proposed program handbook has been shaped and reflects this direction.

On June 2, Council requested stronger emphasis on racial equity goals and workforce requirements, clarification that expanding the urban tree canopy is an important component of the program, and that ensuring long term sustainability of the improvements is a programmatic requirement. Staff has ensured that feedback is reflected in the pilot program handbook being presented for Council's approval.

## **ATTACHMENTS**

- Is legislation required for Council action?  Yes  No
- If yes, is draft legislation attached?  Yes  No
- What other materials are you presenting today?
- Large scale community visions pilot program handbook (Attachment A)



Metro 2019 bond measure to protect and connect nature and people

# Large scale community visions pilot program handbook

2022-2023 Pilot Program Process

June 2022

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

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

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

**Stay in touch with news, stories and things to do.**

[oregonmetro.gov/news](http://oregonmetro.gov/news)

**Follow oregonmetro**



**Metro Council President**

Lynn Peterson

**Metro Councilors**

Shirley Craddick, District 1

Christine Lewis, District 2

Gerritt Rosenthal, District 3

Juan Carlos González, District 4

Mary Nolan, District 5

Duncan Hwang, District 6

**Auditor**

Brian Evans

600 NE Grand Ave.

Portland, OR 97232-2736

503-797-1700

## PROGRAM SUMMARY

The Metro Council seeks to inspire innovative capital projects that improve the coordination of ecological restoration, provision of housing, and safety of transportation in the Metro region. This can be accomplished through the development or restoration of outdoor, natural spaces that are or will be in public ownership. The first funding cycle of the community visions program will make \$10 million available for funding for the community visions program is made possible thanks to the voter-approved 2019 parks and nature bond measure.

### Eligibility requirements

Any project must fulfill the following minimum requirements to be eligible for funding:

- The project must be a capital project
- The project must have at least two contiguous components:
  - 1) Habitat restoration (“Component 1”); and
  - 2) Housing; and/or transportation; and/or commercial improvements (“Component 2”)
- The total project (Component 1 + Component 2) cost must be at least \$6,000,000.
- The total cost for Component 1 must be at least \$2,000,000.
- The project must have committed matching funding in the following amounts: Component 1 funding equal to or greater than the grant request and total project funding equal to or greater than five times the grant request.
- The project must be on publicly-owned property or result in a publicly-owned asset.
- The project must be within Metro’s jurisdictional boundary.
- The project must include public and community partners.
- The project must meaningfully engage with communities of color, Indigenous communities, people with low incomes and other historically marginalized communities in planning and development of project.
- The project must prioritize needs identified by communities of color, Indigenous communities, low-income and other historically marginalized groups.
- The project must address climate impacts and resiliency.
- The project must meet detailed criteria herein.

### Proposal and project review process and timeline

Interested parties can submit a letter of interest at any time between June 6, 2022 and August 31, 2022.

Full applications will be accepted by invitation only.

- Letters of interest accepted summer 2022
- Full applications deadline fall 2022
- Project funding recommendations and Metro Council awards winter 2023
- Grant agreements executed spring 2023
- Project completion dates will be determined based on individual project characteristics, and in all cases must demonstrate urgency and timeliness with project milestones.

### Program outcome and purpose

All projects must demonstrate best efforts to meet or exceed the goals of the program: to uplift communities by leveraging nature to achieve benefits such as job opportunities, affordable housing and safe, reliable transportation.

## Table of Contents

PROGRAM SUMMARY.....	1
Eligibility requirements.....	1
Proposal and project review process and timeline.....	1
Program outcome and purpose.....	2
PROGRAM BACKGROUND.....	6
Program updates.....	6
Project definition.....	6
FUNDING AVAILABILITY AND MATCH REQUIREMENTS.....	6
Qualifying match.....	7
WHO CAN APPLY?.....	7
PUBLIC/PRIVATE PARTNERSHIP.....	7
TYPES OF CAPITAL PROJECTS FUNDED.....	8
Capital improvement projects.....	8
Capital improvement project types.....	8
Allowable costs.....	8
Allowable land acquisition costs.....	9
SELECTION CRITERIA.....	10
PROJECT PLANNING.....	13
APPLICATION PROCEDURES.....	13
Letter of interest.....	13
Formal applications.....	13
REVIEW AND APPROVAL PROCESS.....	13
Letter of interest review.....	14
Full proposal review process.....	14
Metro Council approval.....	14
IMPLEMENTATION CRITERIA.....	14
RESPONSIBILITIES OF PARTIES.....	15
Local jurisdiction.....	15
Leading government-to-government consultation.....	15
Holding fee title or easement.....	15
Formal resolution in support of project.....	15
Ensuring project compliance with the following rules and regulations:.....	15



Community partner..... 15

    Vision/visioning..... 15

    Roles determined ad hoc ..... 16

AGREEMENTS..... 16

    Notice to proceed ..... 16

    Contracting and grant agreement ..... 16

        Grant agreement and insurance requirements ..... 16

        Payment of grant funds ..... 17

        Evaluating project success ..... 17

    Reporting requirements..... 17

ADDITIONAL INFORMATION ..... 17

    Public information..... 17

    Confidentiality of application materials..... 17

    Pre-award activities ..... 18

    Resources..... 18

Contact Metro's large scale community visions program Manager at [LSCV@oregonmetro.gov](mailto:LSCV@oregonmetro.gov) to request hard copies of these documents.

Large scale community visions program manager  
600 NE Grand Ave.  
Portland, OR 97232  
503-797-1700  
[LSCV@oregonmetro.gov](mailto:LSCV@oregonmetro.gov)

Application instructions and forms for 2022-2023 pilot program funding

- Letter of interest instructions
- Full application instructions will be sent to applicants upon invitation to submit
- Application cover sheet
- Line item budget form
- Matching resources form

Template documents include

- Conservation easement
- Sample agreement with a community group
- Sample IGA with local agencies
- Sample IGA with government sponsor

## PROGRAM BACKGROUND

On November 5, 2019, voters across greater Portland approved [Metro's 2019 Bond Measure](#) to Protect and Connect People to Nature (the "bond measure" or the "2019 bond measure"), thereby creating six bond measure programs that fund natural area and water quality protection and connect people to nature.

The large scale community visions program is intended to provide funds to help deliver significant investment in habitat preservation, restoration, and access to nature in coordinated and visionary capital projects that achieve outcomes identified in the bond measure and inspire the Metro Council. Generally, a large scale community vision project is a capital investment that uplifts community by returning natural environment to a central role in projects that seek to address job opportunities, affordable housing and safe, reliable transportation. These projects are transformative local projects of regional significance that increase access to nature for people in urban areas and/or improve the resilience of urban natural areas. By leveraging other public and private investments, these capital projects will also support improvements in affordable housing and safe, reliable transportation.

### Program updates

This handbook is intended to address a first year funding cycle with the goal of clarifying programmatic elements that best achieve the program goals. Aspects of the program as defined in this handbook will need to be updated from time to time to best reflect the needs of Metro and the community. The Metro COO shall, with consultation from the Metro Parks and Nature Director, approve updates to this program as necessary to ensure program effectiveness.

### Project definition

The intent of the program is to fund large-scale capital improvement projects that address ecological restoration, housing affordability, transportation, and job opportunities. An eligible project must have two components. The first required component ("Component 1") is a significant capital improvement project that meets the capital improvement project definition identified in "Types of capital projects funded" below. The second required component ("Component 2") is a significant capital improvement project that addresses housing affordability; and/or transportation; and/or job opportunities. The "total project" is the combination of Component 1 and Component 2.

## FUNDING AVAILABILITY AND MATCH REQUIREMENTS

The 2023 pilot program makes \$10 million available for eligible projects. While letters of interest are accepted until fall 2022, full applications are accepted by invitation only. Check the program website for application deadlines. Make sure to leave enough time between submitting the letter of interest and the full application deadline. Three months is recommended.

The minimum grant amount is \$1,000,000. All grants require a two-part match. Component 1 requires match of \$1 for every \$1 of Metro funding. The total project requires match of \$5 for every \$1 of Metro funding. These two match requirements intentionally overlap according to the following example:

Total project budget = Component 1 + Component 2

Metro funding =  $\frac{1}{2}$  Component 1 budget =  $\frac{1}{6}$  of total budget

	<b>Project Match</b>	<b>Metro LSCV Grant</b>	<b>Total Budget</b>
Component 1	\$1,000,000	\$1,000,000	\$2,000,000
Component 2	\$4,000,000	\$0	\$4,000,000
<b>Total Project</b>	<b>\$5,000,000</b>	<b>\$1,000,000</b>	<b>\$6,000,000</b>

An eligible project must have a total estimated project cost over \$5,999,999, to be considered for program funding. A maximum grant request of \$10,000,000 has been established for the pilot program. A recommended grant amount will be provided by staff. The final grant amount will be determined by the Metro Council.

### Qualifying match

Metro funding awards will not exceed one-sixth the total project cost of successful applications. Requirements and limitations for matching funds are as follows:

- The match can be a combination of financial resources and staff time.
- The match needs to be identified and committed at the time of application.
- The value of donated or acquired property can be used as a match if the property was donated or acquired within one year of the grant application, as long as no Metro funds were used to acquire the property.
- Volunteer time should be valued based on the Independent Sector's value of volunteer time. The most current information can be found at: <https://independentsector.org/resources/>
- Other Metro funding cannot be used as a match for Component 1.
- Metro funds or staff time from other programs may be used as a match for the total project.

It is recognized that some costs must be incurred to adequately prepare the full application. For that reason, the following costs can be included as match if incurred after Metro's invitation to submit a full application:

- Professional services, agency staff time and volunteer time spent on the following activities: site planning, preliminary design, environmental assessment, preparation of cost estimates, construction drawings and specifications, building relationships with potential partners and similar tasks necessary for project preparation.
- When applicable, professional services, agency staff time and volunteer time spent on appraisals, survey, environmental evaluation costs, cultural and historic resource surveys, and building relationships with potential partners for site acquisition.

### WHO CAN APPLY?

The following groups and organizations are eligible to apply: governmental agencies; nonprofit organizations; public educational institutions including primary and secondary schools, community colleges, colleges, universities and extension centers, and private real estate developers.

### PUBLIC/PRIVATE PARTNERSHIP

The project must include public and private partners that will collaborate to deliver project. To be considered a "partner," an entity must be financially invested in the project and responsible for at least

5 percent of the total project budget. Partners are actively engaged in leveraging financial or in-kind services to make the project a success.

## TYPES OF CAPITAL PROJECTS FUNDED

Component 1 of the project must result in a publicly-owned capital asset within Metro's jurisdictional boundary or the region's urban growth boundary. The definition of a capital asset may vary depending on how the project will be accounted for by the public agency that owns or will own the property or easement being acquired or improved. To ensure that this requirement is met, the chief financial officer for the public agency must confirm that the line items funded by the capital grants shall be properly recorded as assets in the jurisdiction's audited financial statements and that the accounting treatment for this project is consistent with other similar transactions. Application instructions direct applicant to provide a resolution of support from the jurisdiction that includes these assurances.

There are three types of capital projects that may be funded through the large scale community visions program. Projects that take the place of required mitigation or penalty payments or are regulatory in nature are not eligible.

### Capital improvement projects

Projects where Component 1 will result in the creation of a capital asset such as a park, trail, boardwalk or nature play area, with a discrete useful life of at least 30 years; OR projects will significantly extend the useful life of an existing capital asset. Component 1 will be an improvement to non-federal, publicly-owned property.

### Capital improvement project types

**Restoration projects:** Create or renovate an asset to enhance fish habitat and/or wildlife connectivity by enhancing stream complexity with large woody debris, removing or replacing culverts to enhance fish passage and habitat, providing viewing platforms to reduce human impact on sensitive habitat, expanding tree canopy and the like.

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

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

### Allowable costs

Component 1 must have a minimum total value of \$2,000,000. LSCV grant funds may only be used for capital expenditures. Such costs can include design and engineering costs, bid documents and permits, as well as materials and construction expenses. No more than 10 percent of grant funds may be used for staff time directly related to a project. Projects that address racial equity may exceed 10 percent as approved by the Metro Council. Overhead and/or indirect costs are not reimbursable, but can be used to meet matching requirements.

Land acquisition or conservation easement acquisition will be only be considered when it is a portion of the capital improvement project as described above. Acquisition is limited to natural areas, wildlife habitat and trail corridors, nature-related parks or other opportunities for increasing people's connection to nature and/or restoring ecological systems. Capital improvement project with a land acquisition component must include the strategy for planning and developing the capital roject.

#### Allowable land acquisition costs

Costs associated with the acquisition including appraisals, appraisal review surveys, environmental review, historic and cultural resource surveys, and similar due diligence, and closing costs.

Costs necessary to return the parcel to a natural state (for wildlife preservation/enhancement and conservation purposes) including land survey, demolition of unwanted structures and hazards, installation of signage and fencing to control access and the initial removal of invasive species and planting of native vegetation.

## SELECTION CRITERIA

Projects will be selected on their ability to address the following criteria and the degree to which project budget is allocated to the specific work that will meet these criteria. Letters of interest may address all or some of the following criteria. Full applications will address all required criteria.

<b>Project should address all of these principles:</b>	<b>Projects must address all of the following criteria:</b>	<b>Projects must identify as one of these types:</b>	<b>Projects must satisfy at least one of the following criteria:</b>	<b>Projects must meet at least one of the following criteria:</b>	<b>Projects must meet all of the following criteria:</b>
Serve communities through inclusive engagement, transparency and accountability. Advance racial equity through bond investments.	Meaningfully engage with communities of color, Indigenous communities, people with low incomes and other historically marginalized communities in planning, development of project.	Restoration project	Protect, connect and restore habitat to support strong populations of native plants, fish and wildlife that can adapt to a changing climate.	Improve access to nature for people.	Satisfy matching fund criteria
Protect clean water for people, fish and wildlife.	Prioritize needs identified by communities of color, Indigenous communities, low-income and other historically marginalized groups.	Urban transformation	Protect and restore floodplains, headwaters, streams and wetlands to increase their capacity to handle storm water to protect vulnerable communities from flooding.	Protect and reclaim rivers, increase tree canopy and/or restore or improve other important natural features in urban areas for the benefit of people and wildlife.	Local public agency partner
Protect and restore culturally significant native plant communities.	Provide data that will support tracking outcomes and reporting impacts, particularly as they relate to communities of color, Indigenous communities, people with low incomes	Neighborhood livability	Increase tree canopy in developed areas to reduce heat island effects.	Create access to nature in a regional or town center, employment area or other areas identified as a priority for	Community partner

	and other historically marginalized communities.			investment in <a href="#">Metro's 2040 Growth Concept</a> .	
Protect, connect and improve habitat for native fish and wildlife.	Include strategies to prevent or mitigate displacement and/or gentrification resulting from project investments.		Use low-impact development practices and green infrastructure in project design and development.	Foster partnerships between public agencies and between the public and private sectors and/or catalyze private investment by focusing public investments and efforts on specific priority projects.	
Make parks and natural areas more accessible and inclusive.	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.		Invest in segments of the regional trail system to expand active transportation opportunities for commuting, recreation and other travel.	Meet a need identified by communities of color, Indigenous communities, people with low incomes and other historically marginalized communities.	
Connect more people to the land and rivers of our region.	Catalyze other investments in transformative regional-scale projects that increase access to nature for people in urban areas and/or improve the resilience of urban natural areas.			Complement investments in affordable housing and transit or active transportation projects.	
Invest in trails for biking and walking.	Leverage with public/private investments in affordable housing,				



	transit and connections to local or regional parks.				
Support community-led parks and nature projects.	Partner with public agencies and private organizations to create access to nature in regional-scale development projects.				
Make communities more resilient to climate change.					
Uplift communities and leverage nature to achieve job opportunities.					
Uplift communities and leverage nature to achieve affordable housing.					
Uplift communities and leverage nature to achieve safe reliable transportation.					

## PROJECT PLANNING

The strongest projects are well thought-out and based on thorough research, planning, and community engagement. This includes looking at the project in the broadest context and framing the need for the project within the surrounding community and the entire watershed basin. Building strong relationships with a variety of stakeholders can allow the project to more holistically address multiple elements of a livable community such as public safety, health, affordable housing and jobs. Metro is willing to provide suggestions to potential applicants and help to identify potential resources. Applicants are encouraged to contact Metro staff as early in the project planning phase as possible. Metro staff can provide a quick assessment over the phone and suggest ways that the project can be strengthened to better meet the program criteria.

It is equally important to gather specific data or research to support the project's need and the context in which the project is discussed. Data or mapping sources to consider include:

- Demographic data collected from federal, state, or local agencies information or local school student populations.
- Existing planning documents such as state or city planning documents, watershed action plans, neighborhood plans, or others that can document the social, economic or ecological needs in the project area.
- Master plans or other specific engineering or feasibility studies completed for the project site.

A list of resources that applicants may consider using is included below.

## APPLICATION PROCEDURES

### Letter of interest

Potential applicants must submit a letter of interest describing the proposed project and how it meets the legibility requirements. Letters of interest can be submitted at any time. Letters of interest should indicate the following items:

- What is the project vision, and how does a large mixed use project driven by community help to achieve that vision?
- Does applicant have a partnership with a non-profit/community organization? Is applicant a non-profit or community organization
- Is there an established or potential partnership with a local jurisdiction?
- How is habitat restoration and/or green infrastructure central to project vision?
- What is the overall project's estimated cost?

### Formal applications

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

## REVIEW AND APPROVAL PROCESS

The administration of this grant program is designed to be responsive to the needs of potential applicants and flexible enough to assist with the evolving nature of capital improvement projects.

### Letter of interest review

Metro staff will review the letter of interest to ensure the applicant's proposal meets the eligibility requirements and can address the criteria adequately. This review may include follow-up communication with the applicant or possibly a site visit. It is the applicant's responsibility to ensure their project is sufficiently defined according to the guidelines so that staff can efficiently review the project.

If staff determines that the project meets the minimum requirements of the grant program, the applicant will be invited to submit a full proposal along with feedback on how to strengthen the application to be more competitive.

Staff will be available to applicants to assist in providing clarity about program goals and requirements while the applicant develops the full proposal.

### Full proposal review process

Staff review. Metro staff will review full proposals for eligibility and completeness.

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

**Proposal scoring:** Metro staff will evaluate each full proposal according to how many of the criteria are met by the project. Additionally, staff will identify conditions of approval necessary to ensure the proposed project will meet the minimum required program goals.

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

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

### Metro Council approval

Metro Council will review the evaluations, site visit analysis, and conditions of approval. Metro Council selects the projects to award. Projects may receive funding lower than requested in the application.

Metro staff will submit a resolution for approval to the Metro Council based on the evaluation scoring and conditions of approval. The Metro Council will consider the information received and award funds to those proposals that best advance the vision, goals and intent of the large scale community visions program.

## IMPLEMENTATION CRITERIA

Metro staff will work closely with project applicants to ensure that tasks, processes, and project elements intended to meet the bond requirements are documented in the appropriate agreements between the parties. Including but not limited to the following items:

- Tribal consultation

- Community engagement
- Contract and workforce equity
- Anti-displacement
- Diversity and racial equity
- Habitat restoration and green infrastructure
- Housing, transportation, and jobs investments

## RESPONSIBILITIES OF PARTIES

Each party will have responsibilities in alignment with their strengths and capacities.

### Local jurisdiction

#### Leading government-to-government consultation

Local governments are expected to lead government-to-government consultation with Tribes that have interest in the project area. Doing so is necessary to satisfy the requirement for meaningful engagement with Indigenous communities.

#### Holding fee title or easement

Local governments are expected to hold a real estate interest in the site sufficient to comply with state law regarding bond expenditures.

#### Formal resolution in support of project

Local government partners are expected to pass a formal resolution expressing support of the project. The form and timing of the resolution should be negotiated on a project-by-project basis in accordance with the needs of the project.

#### Ensuring project compliance with the following rules and regulations:

- Protections for Native American burial sites and objects (Oregon Revised Statute 97.740 et seq.)
- Protections for archaeological objects and sites (ORS 358.905 et seq.), permit requirements for site alteration (ORS 390.325 et seq.), and permit requirements for state public and private land (Oregon Administrative Rule 736-051-0080 to 0090)
- National Historic Preservation Act of 1966 (16 United States Code 470 et seq.)
- Archaeological Resources Protection Act of 1979 (16 USC 470 et seq.)
- Native American Graves Protection and Repatriation Act of 1990 (25 USC 3001 et seq.)
- Other applicable local, state, and federal regulations

### Community partner

The specific roles of the community partner are much more flexible as a result of various regulatory requirements. However, there is one area in which the community partner should have clear responsibility.

#### Vision/visioning

It is expected that the vision for the project is led by the community. The community partner should be in a leading position in the partnership, and have significant financial stake in the project.

## Roles determined ad hoc

Many roles for delivering a capital project of this scale are necessary. However, this handbook is not intended to prescribe those roles, rather to simply identify a few key roles that are necessary. The organization responsible for these roles should be determined based on negotiations amongst the project partners.

- Project Management
- Community Engagement Lead
- Operations and Maintenance Lead
- Project Fiduciary
- Project Attorney
- Other roles as determined necessary by the partnership and as may be recommended by Metro Staff

## AGREEMENTS

Metro staff will work with the successful applicant to enter into the necessary agreements for the project between Metro and the applicant. There are three potential agreements that may be used.

**Intergovernmental Agreement (IGA):** This template is used when the applicant is a government agency.

**Grant Agreement:** This template is used when the applicant is a community-based organization.

**Government Sponsor IGA:** This template is used for the government agency when the applicant is a community-based organization. It is used together with the grant agreement discussed above.

See the program website or [contact staff](mailto:LSCV@oregonmetro.gov) at [LSCV@oregonmetro.gov](mailto:LSCV@oregonmetro.gov) for agreement templates.

## Notice to proceed

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

## Contracting and grant agreement

### Grant agreement and insurance requirements

Metro staff will work with successful applicants to enter into grant agreements with Metro. These contracts will outline specific responsibilities and legal obligations of each party, including insurance requirements, reporting and acknowledgements.

All grant recipients will be required to have the following types of insurance and provide proof of coverage during the contracting phase:

- Commercial general liability insurance covering personal injury, property damage, and bodily injury with automatic coverage for premises and operation and product liability must be a minimum of \$1,000,000 per occurrence. The policy must be endorsed with contractual liability coverage. Metro, its elected officials, departments, employees and agents must be named as an ADDITIONAL INSURED.

- Automobile bodily injury and property damage liability insurance. Insurance coverage must be a minimum of \$1,000,000 per occurrence. METRO, its elected officials, departments, employees, and agents must be named as an ADDITIONAL INSURED.
- Worker's compensation coverage in compliance with Oregon law.

Please email [LSCV@oregonmetro.gov](mailto:LSCV@oregonmetro.gov) if these insurance requirements would present a barrier to applicant organization or business.

#### Payment of grant funds

Grant funds used for capital improvements are paid out on a reimbursable basis. Metro will hold back 10 percent of each reimbursement request until Metro receives and approves the final report. Payment of grant funds used for acquisition will be negotiated on a project-by-project basis. Grant recipients must spend their grant funds within 24 months of contract signature, unless otherwise agreed to by Metro.

#### Evaluating project success

If invited to submit a full proposal, applicant will be required to describe as concretely as possible, the metrics used to evaluate the impacts of a grant-funded project. If awarded a grant, these metrics will be incorporated into the grant agreement. Grant recipients will be required to report on the project's status, successes and challenges in quarterly progress reports, and on the overall project impacts in a more detailed final report at the end of the grant. If awarded a grant, Metro may suggest refinements to applicants proposed metrics during the contracting phase.

Metro will require capital grant recipients to submit progress reports for three years after the grant term. Information requested will reflect the outcomes that the applicant identified in the grant proposal. Metro may conduct site visits to evaluate the progress of the project during the grant term, as well as during the three-year reporting period, and will notify the grantee prior to site visits occurring.

#### Reporting requirements

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

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

## ADDITIONAL INFORMATION

#### Public information

All applications are subject to the Oregon Public Records Law.

#### Confidentiality of application materials

Proposals, including supporting documents such as financial materials, reports and records, will be read and evaluated only by Metro staff and grant review committee members who are required to sign

confidentiality agreements in advance of reviewing application materials. Application and grant materials will be maintained electronically on a Metro server with restricted access, and periodically destroyed as allowed by audit policies and state law.

Applicant may identify as confidential any reports, books, records, maps, plans, income tax returns, financial statements, contracts and other similar written materials that are directly related to the proposal and that are submitted to or reviewed by Metro. Applicant must prominently mark any information that it claims confidential with the mark "CONFIDENTIAL" prior to submittal to Metro. Metro will treat as confidential any information so marked to the extent allowed under Oregon law. Metro will make a good faith effort not to disclose the information unless Metro's refusal to disclose would be contrary to applicable Oregon law, including, without limitation, ORS Chapter 192.

### Pre-award activities

Notwithstanding any oral or written assurances, there is no obligation on the part of Metro to cover pre-award costs.

### Resources

The following are data and information sources that applicants may find useful in the preparation of letters of interest and/or full applications. Applicants are encouraged to find resources listed here, and otherwise, that best support their project and grant application.

Regional Conservation Strategy. This document organizes conservation strategies for the Portland metropolitan region by landscape types – natural area, working lands and developed areas – as well as strategies for biodiversity corridors and for species of special concern. This document will be helpful when considering how a project advances biodiversity on a regional scale. It is available on the Intertwine Alliance website at [www.theintertwine.org](http://www.theintertwine.org).

The Regional Conservation Strategy High Value Habitat viewer (<http://www.regionalconservationstrategy.org>) shows the high value habitat across the Portland-Vancouver region and within any watershed, jurisdiction, urban growth boundary/area, or custom shape that applicant choose. It can help applicants visualize the relative importance of habitats within a project area.

Applicants can also view summary statistics about the land cover, habitats, and parks and ownership in a selected area. Comparing the high value habitats with the other layers on the map can help prioritize conservation efforts. For example, when viewing the parks and protected areas layer and the high value habitats at the same time, high value habitats not currently protected are revealed. Viewers can also determine whether any high value habitats exist that could connect currently protected habitats.

Public school districts. One source of local demographic data is neighborhood schools. Each public school maintains data on the percentage of students eligible for the free and reduced lunch program and students participating in English as a Second Language program.

Regional Equity Atlas (<http://equityatlas.org>). Using maps, policy analysis, and community-based research, the Equity Atlas assesses how well different populations across the four-county Portland-Vancouver metro region can access key resources necessary for meeting their basic needs and advancing their health and well-being.

[Metro's web site](#) has a variety of maps and tools to assist with project research:

MetroMap (<https://gis.oregonmetro.gov/metromap>) This is Metro's web mapping service for viewing and printing maps or data specific to an area of interest. MetroMap allows viewers to see map-based information about a location of choice. View information on parcel and tax assessment, zoning, political boundaries, planning, flood plain and special districts. The results can be displayed in text-only format or on a map.

Urban Growth Boundary tool (<https://www.oregonmetro.gov/library/urban-growth-boundary/lookup>) Enter an address to see a map that shows whether a specific property is inside, was added to, or removed from the urban growth boundary.