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ការគោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលបានការប្រឹក្សាស្តីពីរើសអើងសូមទូរស័ព្ទទៅលេខ 503-797-1700 ។ [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights) ។ បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំពីរថ្ងៃ ថ្ងៃធ្វើការ មុនថ្ងៃប្រជុំដើម្បីអាចឲ្យគេបកប្រែភាសាសំរាប់លោកអ្នក ។

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**Parks and Nature Large Scale  
Community Visions Program -  
Direction on Second Round**  
*Work Session Topics*

Metro Council Meeting  
Tuesday, January 16, 2024

Recommendation	Options	Pros	Challenges and Risks
Require public partner to apply	<ul style="list-style-type: none"> <li>Require public partner to apply</li> <li>Allow community partner or private partner to apply but to qualify must submit agreement with public partner confirming public ownership of final asset</li> </ul>	<ul style="list-style-type: none"> <li>Meets general obligation bond bond's core legal requirement</li> <li>Improves readiness timelines for advancing agreements</li> <li>Program continues to build on pilot round approach of catalytic funding</li> </ul>	<ul style="list-style-type: none"> <li>Staff would need to work closely with public partners if they have yet to establish a private partnership rooted in community engagement</li> </ul>
Modify 1:5 total project match requirement	<ul style="list-style-type: none"> <li>Remove 1:5 match and retain existing 1:1 match on nature uplift</li> <li>Reduce total project match 1:2</li> <li>Allow for scalable match based on public partner's budget</li> <li>Retain 1:5 match but modify handbook to state match can be developed over time and does not need to be committed at time of application</li> </ul>	<ul style="list-style-type: none"> <li>Changes are responsive to feedback obtained to date from local partners that the 1:5 match is a barrier due to budget and staffing constraints</li> <li>Lower match reduces entry point and aligns with vision of program's catalytic funding</li> <li>1:1 match still significant commitment, given range of grant awards</li> </ul>	<ul style="list-style-type: none"> <li>Retaining 1:5 match but allowing for flexibility may introduce challenges in advancing legal agreements</li> </ul>
Remove contiguous components requirement	<ul style="list-style-type: none"> <li>Nature uplift, transportation, housing and workforce creation elements do not need to be bordering each other</li> <li>Broader project areas or corridor-wide project can apply</li> </ul>	<ul style="list-style-type: none"> <li>Creates a broader community vision, driving impacts on a more expansive geographic scale that still aligns with program vision</li> <li>Introduces flexibility in project areas that may be heavily constrained by existing infrastructure or private land ownership</li> <li>Opportunity for new, innovative partnerships to emerge that align along broader community driven visions</li> </ul>	<ul style="list-style-type: none"> <li>Shifting this criteria may increase number of applicants and require a robust review process to ensure funds are best allocated</li> </ul>

		<ul style="list-style-type: none"> <li>• Changes are responsive to feedback obtained to date</li> </ul>	
General updates	<ul style="list-style-type: none"> <li>• Update handbook to improve clarity around criteria/process</li> <li>• Update with more language around Tribal consultation expectations</li> <li>• Allow applicants to submit applications at any time; applications to be evaluated at set timelines throughout the year</li> </ul>	<ul style="list-style-type: none"> <li>• Opportunity to update handbook to reflect updated information as it pertains to current status of overall Parks and Nature bond</li> <li>• Rolling cycle allows for more flexibility in timing for applicants</li> </ul>	<ul style="list-style-type: none"> <li>• Rolling cycles may require additional time commitments throughout the year</li> </ul>

## **STAFF REPORT FOR COUNCIL WORK SESSION**

### **PARKS AND NATURE BOND'S LARGE SCALE COMMUNITY VISIONS PROGRAM: DIRECTION ON SECOND ROUND**

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Date: November 13, 2023

Department: Parks & Nature

Meeting Date: November 28, 2023

Prepared by: Linda Bartolini Venegas,  
she/her, large scale community visions  
program coordinator

Presenters: Jon Blasher, he/him, Parks  
and Nature Director, MG Devereux,  
he/him, Parks and Nature Deputy  
Director

Length: 30 minutes

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### **ISSUE STATEMENT**

On November 5, 2019, voters in greater Portland overwhelmingly approved a \$475 million parks and nature bond, creating the large scale community visions program to support large-scale projects that uplift communities by leveraging nature to achieve benefits such as job opportunities, affordable housing, and safe reliable transportation.

In alignment with a Council approved pilot program handbook, a 2022 solicitation for projects resulted in Metro Council awarding three projects in May 2023 in the pilot round of large scale community visions funding.

Since this past spring, staff have continued to engage in conversations with local government partners, community partners, pilot round grantees and other stakeholders to assess how the pilot program worked, identify potential changes and apply any lessons learned to a second round of the program in order to best serve the goals of the bond measure, continue to address Metro Council's direction and meet the needs of the community in the future.

The Metro Council's consideration and discussion of these findings at the November 28 work session will allow staff to further refine parameters for a second round of solicitation and award in 2024.

### **ACTION REQUESTED**

Staff is requesting Council direction on adjustments to the program handbook, as described in the attached table. Staff will ask Council for direction on how and whether to advance the entire package of recommendations or individual adjustments.

Based on Council discussion and direction at the November 28 meeting, Parks and Nature can return in early 2024 with adjustments to the program handbook for Council consideration and approval.

## **IDENTIFIED POLICY OUTCOMES**

Direction from the Metro Council has and will continue to shape the large scale community visions program to help deliver significant investment in habitat preservation, restoration, and access to nature in coordinated and visionary capital projects through the bond measure program and the Council approved program handbook.

After the completion of the pilot round, the Council asked staff to ensure a successful and productive second round of solicitation by identifying potential project opportunities and feedback on the overall feasibility of the program from partners around the region in advance of the solicitation in early 2024.

During briefings in fall of 2023, staff highlighted a few elements of the current program handbook that are barriers to successful grant applications, funding agreements and project implementation. Councilors affirmed the continuation of the overall approach to the program and to continue to use the program handbook to articulate desired outcomes. Councilors asked staff to bring a recommendation for minor adjustments to the program handbook for consideration and discussion at the November 28 work session.

## **STAFF RECOMMENDATIONS**

In response to Council direction to bring proposed adjustments to help ensure a successful second round of funding, staff recommends for Council consideration and discussion the list of potential program changes outlined in the attachment.

## **STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION**

The six programs in the parks and nature bond provide a range of strategies to preserve priority habitat and to bring nature closer to communities across the region. In some ways, the large scale community visions program has similar aims as the Parks and Nature bond's Nature in Neighborhoods grant program, which strives to create nature that's accessible at the community scale and has completed the first of several funding rounds with Parks and Nature bond dollars. What distinguishes the bond's large scale community visions program is the scale of the potential grant awards and required nexus to housing, workforce and transportation elements.

However, with this scale, come challenges to identify projects that meet the current match requirements, minimum project cost thresholds and need to make impacts in housing, transportation and economic development. Through conversations with partners across the region, staff have concluded that many exciting project opportunities do not meet the parameters of the pilot program handbook as currently constructed. The table in Attachment 1 describes pathways for Council consideration for adjusting the program parameters to better meet community need, while continuing to meet bond requirements and criteria and leverage the following desired outcomes:

### *Demonstrating impacts and transformation on agency priorities*

Council designed this program to maximize opportunities to advance agency priorities on urban development, housing, workforce and transportation as Parks and Nature staff have leveraged inter-departmental coordination across Metro. Through designating awards for projects that utilize investments in nature uplift to leverage regional outcomes in housing, community and economic development and transportation, the pilot round demonstrates the potential for this alignment. As the Metro Council considers approval of a north star for Metro's work through finalizing five-year strategic targets for housing, environment and economic development, there is opportunity to utilize this program to support projects that demonstrate advancements in all three arenas.

### *Community voice shaping projects and process*

The Metro Council has directed that the large scale community visions program be driven by community voice in innovative ways. Since the completion of the pilot round, staff have been meeting with park providers, conservation and community partners to understand interest in and barriers to utilizing large scale community visions funding for priority projects. As with all bond funded projects, the requirement that each project have a public owner means that work may be needed before or after project award to support productive conversations and match making between community partners and jurisdictions across the region.

## **BACKGROUND**

An overview of the program and key updates:

- In June 2022, Metro Council approved a handbook that identified desired outcomes and eligibility requirements and initiated a pilot project solicitation of up to \$10 million.
- During the solicitation for letters of intent, Parks and Nature staff reached out to the region's park providers, jurisdictions and community-based organizations to understand project opportunities that may be eligible for the pilot round. Staff shared this opportunity through Metro's website, with hundreds of former and current Parks and Nature grant recipients and with housing and community development focused organizations through collaboration with the Planning, Development and Research Center team.
- In summer 2022, the NOFA received four letters of intent and Parks and Nature staff met with letter of intent submitters in winter 2022.
- In Spring 2023, Metro Council and staff reviewed applications received for the pilot round of funding and the following projects were designated with conditional funding. Staff are coordinating with these projects to ensure eligibility requirements can be satisfied and lead to the successful execution of final funding agreements.
  - Trust for Public Lands/Oregon State University - acquisition of private timber site in the Tualatin Mountains area, \$3.5 million
  - OMSI/CRTFIC - Waterfront Education Park and OMSI district catalyst on the Willamette River, \$7 million

- Albina Vision Trust – Site acquisition adjunct to Willamette River, \$5 million
- Since spring 2023, staff met with 15 local government and community partners across the region, as well as internal stakeholders to understand interest in and barriers to utilizing large scale community visions funding for priority projects. The feedback from those conversations is summarized below:

<b>Worked Well</b>	<b>Barriers/Challenges</b>
<ul style="list-style-type: none"> <li>● Catalytic nature of pilot round allows for Metro to provide technical assistance and support to innovative and ambitious projects</li> <li>● Initial funding allows opportunity for projects to unlock additional funding</li> </ul>	<ul style="list-style-type: none"> <li>● 1:5 match a barrier for smaller jurisdictions and organizations</li> <li>● Limited staff capacity to apply and manage current grant criteria</li> <li>● Contiguous component limits potential for corridor-wide visions</li> <li>● Nature uplift is significant; minimum \$2 million investment in nature along with other investments is challenging</li> <li>● Project must result in publicly owned asset; essential to identify committed public partner at onset of project</li> </ul>

**ATTACHMENT**

1. Table

**Affordable Housing for Greater  
Portland: Potential Funding and  
Stakeholder Process  
Considerations**  
*Work Session Topics*

Metro Council Meeting  
Tuesday, January 16, 2024

# AFFORDABLE HOUSING FOR GREATER PORTLAND: POTENTIAL FUNDING AND STAKEHOLDER PROCESS CONSIDERATIONS

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Date: Jan. 2, 2024  
Department: COO, Housing, GAPD  
Work Session Date: Jan. 16, 2024

Presenters: Marissa Madrigal (she/her), Chief Operating Officer; Patricia Rojas (she/her), Regional Housing Director; Andy Shaw (he/him), Director of Government Affairs & Policy Development  
Length: 45 min.

Prepared by: Craig Beebe,  
craig.beebe@oregonmetro.gov

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## **ISSUE STATEMENT**

As the 2018 Metro Affordable Housing bond nears its successful completion, stakeholders and partners across the region have asked Metro to explore potential options for continuing investments to create affordable housing in the greater Portland region.

## **ACTION REQUESTED**

Provide guidance on proposed process to convene stakeholder conversations and the development of staff recommendations regarding regional affordable housing funding options.

## **IDENTIFIED POLICY OUTCOMES**

- Advancing the Metro Council’s “Housing For All” strategic target, adopted via Resolution 23-5362, to ensure the region has “ample housing at all income levels and everyone in the region can access services that meet their needs.”
- Addressing and preventing homelessness by aligning with and supporting partners implementing the voter-approved regional Supportive Housing Services fund.
- Supporting the continuing implementation of the Strategic Plan to Advance Racial Equity, Diversity and Inclusion.

## **POLICY QUESTION(S)**

- What questions about outcomes, potential investments, and revenue options does Council have about potential future regional housing funding?
- What considerations does Council wish staff to integrate into stakeholder conversations and other work to identify potential options and recommendations for moving forward?

## **STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION**

High housing costs and wages that haven't kept up with the cost of living have created an affordable housing and homelessness crisis in Greater Portland. These challenges are near-universal concerns across the region, affecting communities large and small.

Fortunately, we know what can make a difference in this crisis: creating affordable housing and providing services like rent assistance, mental health service, etc.

In partnership with an array of public, private and community partners, Metro's voter-approved Affordable Housing bond will create roughly 4,700 affordable housing units regionwide by 2027 – about 20% more units than promised to voters in 2018.

However, all funds from the Metro Affordable Housing Bond will soon be committed as planned, as will funds from the City of Portland's 2016 housing bond. Without further local or regional affordable housing funding, soon only the State of Oregon's limited funds would be available to continue filling the region's affordable housing gap, and to meet ambitious housing production goals set by Governor Tina Kotek and the Metro Council.

Given this context and continuing need, a number of housing, business and community stakeholders have asked Metro staff to explore options for future regional funding – including the opportunity to do so with no increase to existing tax rates – to continue creating affordable housing for families, older adults and others at risk of homelessness.

To explore Metro's potential role in the ongoing funding and production of affordable housing in greater Portland, staff propose to convene a Regional Housing Stakeholder Advisory Table in early 2024. Like the engagement process that informed the development of the 2018 Metro Housing Bond, the Stakeholder Advisory Table would bring together diverse cross-regional and cross-sector leaders to provide advice and input as the Metro Chief Operating Officer develops recommendations for the Metro Council, including such topics as revenue, priorities, eligible investments and outcomes.

The Stakeholder Advisory Table will need to be pragmatic regarding what is achievable and appropriately aligned with the housing funding and creation roles of Metro and other public, nonprofit and private-sector partners. Although the Advisory Table will not be appointed by nor directly advise the Metro Council, the Council can help frame its conversations by providing staff with key questions and/or considerations it wishes to see incorporated into the process.

The Stakeholder Advisory Table will complete its work by early May. The Metro Chief Operating Officer will develop recommendations for Metro Council discussion in May 2024, considering, among other factors: the Stakeholder Advisory Table's advice; Metro Council direction; research into regional need, opportunities and programmatic considerations; lessons from the implementation of the 2018 bond; input from public partners, community members and regional leaders; and public opinion broadly.

## **BACKGROUND**

The Metro Council provided informal direction to begin forming a Stakeholder Advisory Table at its work session on Dec. 12, 2023.

- Is legislation required for Council action? **No**

# 2019 Parks and Nature Large Scale Community Vision – Direction on Second Round

Council Work Session

January 16, 2024



Metro

# Background | Large scale community visions program



\$30 million for investments in capital projects that deliver nature uplift and address housing, transportation and workforce creation

Council approved pilot program handbook emphasized projects must:

- Be driven by community engagement and community interests
- Catalyze investments in transformative regional-scale projects that increase access to nature for people in urban areas and/or improve the resilience of urban natural areas
- Leverage public/private investments in affordable housing, transit and connections to local or regional parks
- Be the result of a partnership with other public agencies and private organizations



# Overview of today's discussion



Metro

Today's goal is to receive Council direction on how to tee up a future round of funding that best advances Council's goals for this program by talking through the following:

- Program context and process to date
- Review feedback received
- Discuss recommendations for program adjustments
- Determine which recommendations to move forward

# Pilot round criteria



Metro

- Minimum \$6m project budget
- Minimum \$1m grant
- 1:5 match for overall project
- 1:1 match for nature uplift components
- Nexus with housing, transportation, and/or workforce creation
- All elements of project must be contiguous
- Capital project with public partner



# Council approved program criteria in the bond measure



Improve access to nature for people

Protect and reclaim rivers, increase tree canopy and/or restore or improve other important natural features in urban areas for the benefit of people and wildlife

Create access to nature in a regional or town center, employment area or other areas identified as a priority for investment in Metro's 2040 Growth Concept

Foster partnerships between public agencies and between the public and private sectors and/or catalyze private investment by focusing public investments and efforts on specific priority projects

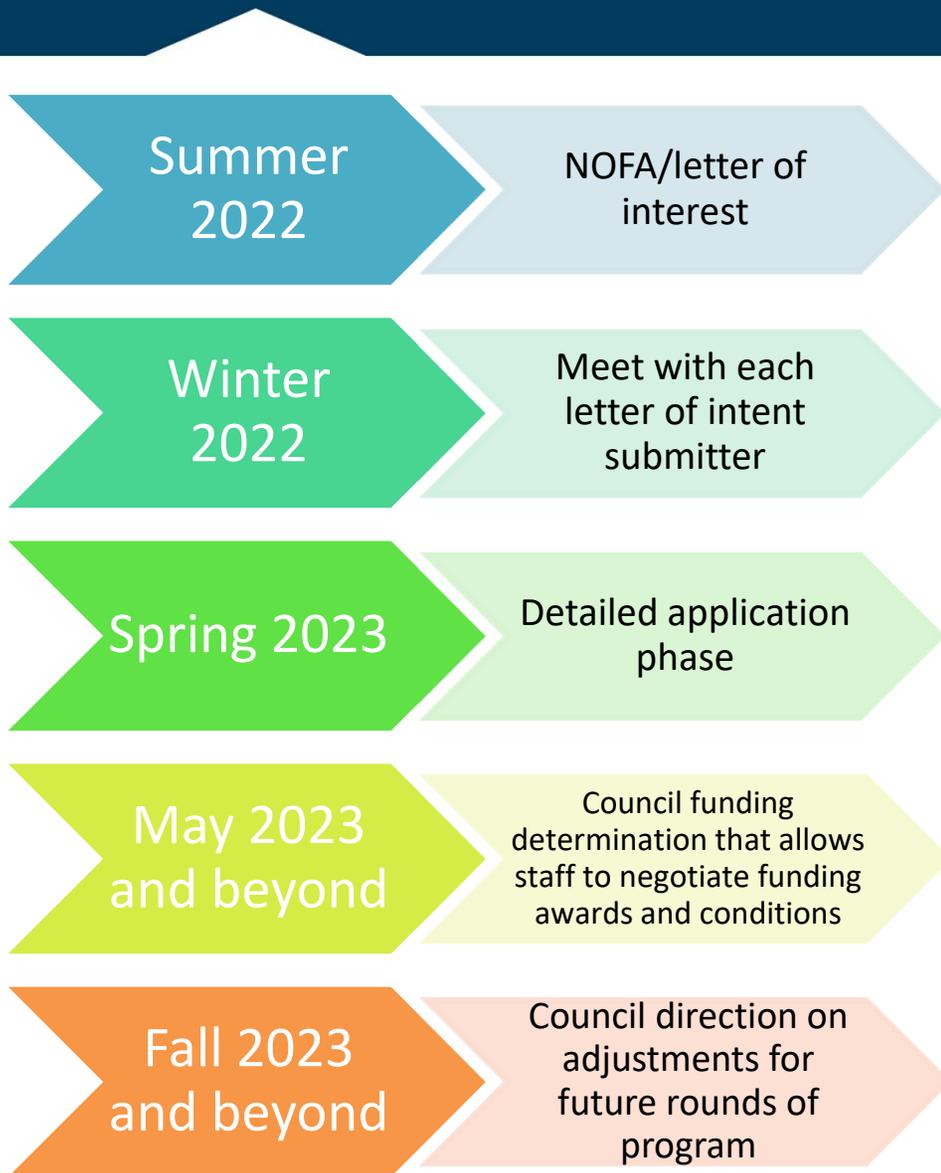
Meet a need identified by communities of color, Indigenous communities, people with low incomes and other historically marginalized communities

Complement investments in affordable housing and transit or active transportation projects

# Pilot round timeline



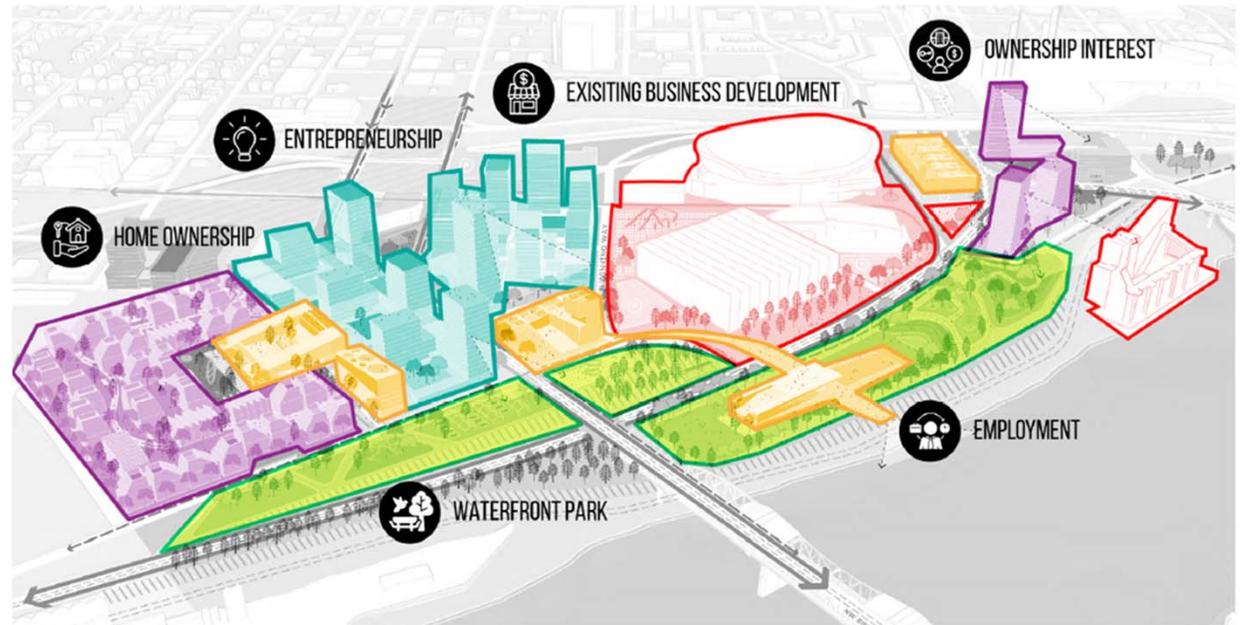
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# Pilot round projects



- Trust for Public Land & Oregon State University - acquisition of private timber site in the Tualatin Mountains area, \$3.5 million
- OMSI/Columbia River Inter-Tribal Fish Commission and Prosper Portland for development of the Waterfront Education Park and OMSI district catalyst on the Willamette River, \$7 million
- Albina Vision Trust – site acquisition adjacent to the Willamette River, playing a central role in the transformation and revitalization of the lower Albina neighborhood, \$5 million



# Outreach & Engagement



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- Outreach conducted broadly across the region to park providers, conservation and community organizations to share about program and understand project opportunities
- In depth follow-up conversations with Latino Network, Unite Oregon, City of Tigard, Portland Botanical Garden, Street Trust, City of Tigard, Portland State University, Portland Audubon, City of Cornelius, City of Gresham, City of Portland Planning and Sustainability, Clackamas County, Multnomah County, City of Milwaukie, Tualatin Hills Park and Recreation
- Coordination and engagement with internal stakeholders at Metro, including Parks and Nature as well as Transit Oriented Development, Housing, Planning, Strategic Partnerships and Innovation

# Feedback on pilot round



<b>Worked Well</b>	<b>Barriers/Challenges</b>
<ul style="list-style-type: none"><li>• Catalytic nature of pilot round allows for Metro to provide technical assistance and support to innovative and ambitious projects</li><li>• Initial funding allows opportunity for projects to unlock additional funding</li></ul>	<ul style="list-style-type: none"><li>• 1:5 match a barrier for smaller jurisdictions and organizations</li><li>• Contiguous component limits potential for corridor-wide visions</li><li>• Project must result in publicly owned asset; essential to identify committed public partner at onset of project</li><li>• Limited staff capacity to apply and manage given current grant criteria</li></ul>

# Council direction to date



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- Remain accountable to bond requirements and Council approved criteria/outcomes
- Be strategic and efficient with program funding to ensure future flexibility
- Continue strong relationships with applicants; leverage expertise across agency to explore multiple pathways to support projects as needed

# Overall Council values guiding program



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- Focus on impact, opportunity and innovation and support big picture thinking
- Retain vision and pathway as a catalytic program
- Broad regional distribution of program investments

# Recommendations for Council consideration

- Remove or modify 1:5 overall project match requirement
- Remove contiguous components requirement
- Require public partner to apply
- Rolling cycle application

# Recommendations for Council consideration

Recommendations aim to strike a balance of broadening accessibility of program across the region while ensuring project readiness and alignment with core bond requirements and criteria

## Reward

- Broaden accessibility for projects across region
- Further increase innovative partnerships that align along broader community driven visions
- Public partner upfront improves readiness and agreement timelines

## Risk

- Will likely increase number of applicants and could make funding decisions more competitive
- Requiring public partner upfront may reduce applicant pool for projects in earlier stages of readiness

# Topics for Council discussion



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How do the recommended adjustments align with Council's goals and expectations for the program?

Does Council have additional evaluation of potential reward and risk of advancing recommended adjustments to the program?

Is Council in agreement with advancing these recommended adjustments to the program?

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# Reference Slides



Slides 16-19 to be used only if needed.

# Project match adjustment



<b>Recommendation Options</b>	<b>Pros</b>	<b>Challenges and Risks</b>
<ul style="list-style-type: none"> <li>• Remove 1:5 match and retain existing 1:1 match on nature uplift</li> <li>• Reduce total project match 1:2 and retain existing 1:1 match on nature uplift</li> <li>• Allow for scalable match based on public partner's budget</li> <li>• Retain 1:5 match but modify handbook to state match can be developed over time and does not need to be committed at time of application</li> </ul>	<ul style="list-style-type: none"> <li>• Changes are responsive to feedback obtained to date from local partners that the 1:5 match is a barrier due to budget and staffing constraints</li> <li>• Lower match reduces entry point and aligns with vision of program's catalytic funding</li> <li>• 1:1 match still significant commitment, given range of grant awards</li> </ul>	<ul style="list-style-type: none"> <li>• Retaining 1:5 match but allowing for flexibility may introduce challenges in advancing legal agreements</li> </ul>

# Contiguous component adjustment



Recommendation	Pros	Challenges and Risks
<ul style="list-style-type: none"><li>Nature uplift, transportation, housing and workforce creation elements do not need to be bordering each other</li></ul>	<ul style="list-style-type: none"><li>Creates a broader community vision, driving impacts on a more expansive geographic scale that still aligns with program vision</li><li>Introduces flexibility in project areas that may be heavily constrained by existing infrastructure or private land ownership</li><li>Opportunity for new, innovative partnerships to emerge that align along broader community driven visions</li><li>Changes are responsive to feedback obtained to date</li></ul>	<ul style="list-style-type: none"><li>Shifting this criteria may increase number of applicants and require a robust review process to ensure funds are best allocated</li></ul>

# Public partnership adjustment



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<b>Recommendation</b>	<b>Pros</b>	<b>Challenges and Risks</b>
<ul style="list-style-type: none"><li>• Require public partner to apply <i>or</i></li><li>• Allow community partner or private partner to apply but to qualify must at minimum identify committed public partner or submit agreement with public partner confirming public ownership of final asset</li></ul>	<ul style="list-style-type: none"><li>• Meets general obligation bond bond's core legal requirement</li><li>• Improves readiness timelines for advancing agreements</li><li>• Program continues to build on pilot round approach of catalytic funding</li></ul>	<ul style="list-style-type: none"><li>• Staff would need to work closely with public partners if they have yet to establish a private partnership rooted in community engagement</li></ul>

# General programmatic updates



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<b>Recommendations</b>	<b>Pros</b>	<b>Challenges and Risks</b>
<ul style="list-style-type: none"><li>• Update handbook to improve clarity around criteria/process</li><li>• Update with more language around Tribal consultation expectations</li><li>• Allow for rolling review cycles so that applicants can submit for funds when readiness allows</li></ul>	<ul style="list-style-type: none"><li>• Opportunity to update handbook to reflect updated information as it pertains to current status of overall Parks and Nature bond as well as evolving Tribal Affairs policies for Parks and Nature projects</li><li>• Introduce clarity in sections that have generated confusion or most questions to date</li><li>• Rolling cycle allows for more flexibility in timing for applicants and may increase readiness of applicants</li></ul>	<ul style="list-style-type: none"><li>• Rolling cycles may require additional time commitments throughout the year</li></ul>



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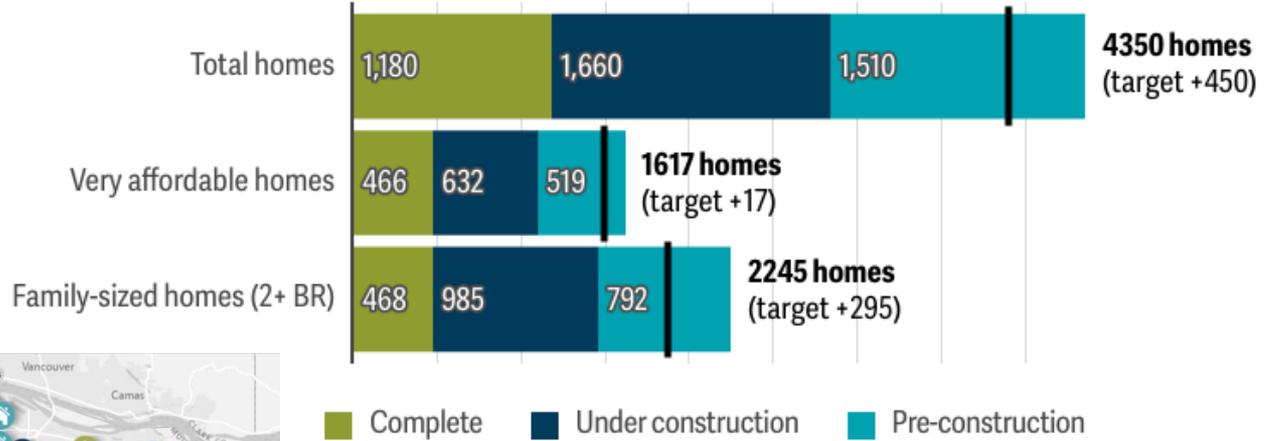
# Future Regional Affordable Housing Funding

Process, questions and considerations

Metro Council work session | Jan. 16, 2024



# Promises kept: Metro Housing Bond



# Considering the context

Housing and homelessness  
are universal concerns

People know that housing and services work to  
address the need

Lack of support for new taxes

# Potential revenue paths

- New property tax bond measure
- Allocating unanticipated Supportive Housing Services revenues
- No immediate action

# Potential investment priorities

- Regulated affordable housing
- Permanent supportive housing
- Incentives and innovation

# Proposed values

- **Urgency:** Recognize and address the need
- **Pragmatism:** Learn from what works
- **Equity and inclusion:** Prioritize voices of diverse stakeholders, different expertise and lived experiences
- Ensure **transparency, accountability and oversight**

# Questions to consider

Viable funding paths

Potential investment impact and accountability

Community and partner outcomes

Metro's role with others in the region

# Threads of input

Stakeholder Advisory Table (advises COO)

Financial analysis

Research: Needs, opportunities, lessons from previous measures and other communities

Engagement with stakeholders, community

# Proposed next steps

February – Launch Stakeholder Advisory Table

Spring – Engagement and research

May – COO recommendation

June – Council discussion and decisions

# Discussion questions

- What values and priorities would Council like to see incorporated into this process?
- What questions would Council like to be explored?

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