



**WEST MULTNOMAH**  
Soil & Water Conservation District

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## Adopted Budget Fiscal Year 2019-2020

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Budget Hearing held on June 12, 2019

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*Clean Water, Healthy Soil, Diverse Habitat*

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# **SECTION 1: BUDGET PROCESS AND BUDGET COMMITTEE**

## **Purpose and Structure of the Budget Message**

This Budget Message explains the West Multnomah Soil & Water Conservation District (District) budget for July 1, 2019, through June 30, 2020 (Fiscal Year (FY) 2019-2020). The budget is submitted for consideration under Oregon Budget Law, which guides the District through the budgeting process and is defined in Oregon Revised Statutes (ORS) Chapter 294.305 to 294.565 of Oregon State Law. This document is organized into three sections. Section 1 contains background information for a better understanding of the budgeting process. Section 2 provides a review of all our programs (which change slightly from year to year) and details about next year's special initiatives. Section 3 provides a written explanation of the budget and the assumptions used.

## **Requirements of a Special District with a Voter-Approved Tax Base**

The District is a special district of the State of Oregon. It is a local unit of government formed under the authority of, and with the powers and duties described under, ORS chapter 568. The District is governed by an elected Board of Directors representing five geographical zones and two at-large positions. The Board includes four appointed non-voting Associate Directors.

District voters approved a tax base in 2006, ensuring a stable revenue source for programs delivered to District constituents beginning in FY 2007-08. The permanent rate limit is set at 7.5 cents per \$1,000 of assessed value. The District's classification as a public taxing entity requires compliance with Oregon Local Budget Law.

The District is required to establish a Budget Committee, hold public meetings, and approve the proposed budget. These meetings are normally in April. All meetings of the Budget Committee are subject to Oregon's Public Meetings Law (ORS 192.610 through ORS 192.690). Our Budget Calendar (see Appendix) reflects all actions and due dates required to ensure we are in compliance with Oregon Budget Law.

The Budget Message and accompanying worksheets and supporting data are provided to the Budget Committee and the public for review and are intended to explain the proposed budget and highlight any significant changes in the District's financial position. These documents will be available at the District office and on the District website ([www.wmswcd.org](http://www.wmswcd.org)) throughout the budget process.

## **Budget Committee**

The Budget Committee (see table below) is composed of the District's seven-member Board of Directors and an equal number of local registered voters (Electors) residing within the District's boundary. Electors are appointed by the District's Board of Directors to serve three-year terms. Terms of Electors are staggered to help provide continuity from year to year and to allow new ideas and perspectives to be part of the Committee's deliberations.

Name	Position	Status
Finlay Anderson	Elector	Re-appointed in 2018, in second year of term
Rachel Dvorsky	Elector	Appointed in 2017, in third year of term
Jan Hamer	Elector	Re-appointed in 2018, in second year of term
Sydney Scout	Elector	Appointed in 2018, in second year of term
Xuan Sibell	Elector	Re-appointed in 2019, in first year of term
Patrick Willis	Elector	Re-appointed in 2017, in third year of term
Edward Woods	Elector	Re-appointed in 2017, in third year of term
Jane Hartline	Board, Zone 2	Elected Board member through 12.31.20
Brian Lightcap	Board Secretary, Zone 4	Elected Board member through 12.31.22
Shawn Looney	Board Vice Chair, At-Large	Elected Board member through 12.31.22
Weston Miller	Board Treasurer, At-Large	Elected Board member through 12.31.20
Kim Peterson	Board, Zone 1	Elected Board member through 12.31.20
Terri Preeg Riggsby	Board Chair, Zone 5	Elected Board member through 12.31.22
George Sowder	Board, Zone 3	Elected Board member through 12.31.20

### **Duties of the Budget Committee**

The official duties of the Budget Committee are to:

1. Meet publicly to review the proposed budget document and message;
2. Provide an opportunity for public input and discussion on the proposed budget; and
3. Approve the budget and the necessary property tax rate as proposed or as modified with all funds in balance.

The Committee elects a presiding officer to help the Committee reach an affirmative vote in approving the budget. In order to perform its duties, the Committee must have a quorum present, which is defined as a majority (eight or more) of the total Committee membership (14). In order to take formal action, the Committee must have an affirmative vote at least equal to a quorum.

After the Budget Committee has approved the budget, set the property tax levy and submitted the Approved Budget to the Board of Directors, their work as the Budget Committee is done.

## **Duties of the Board of Directors**

Following approval of the budget by the Budget Committee, the District's Board of Directors holds a budget hearing on the budget as approved by the Committee. Any person may comment on the approved budget at the hearing.

After the hearing, the Board of Directors may change the budget expenditures approved by the Budget Committee. However, if the Board increases expenditures in either the General Fund or the Sturgeon Lake Fund by 10 percent or more, the District must republish the amended budget summary and hold another budget hearing.

The deadline for the Board of Directors to enact a resolution that adopts the budget, makes appropriations, and imposes a tax levy is June 30.

## **Post-Adoption Budget Changes**

Once the budget is adopted, the District is bound by the resources and requirements for each fund as detailed in the budget document and summarized in the resolution. The resolution makes appropriations in total for District operations, which includes requirements by category: personnel, material & services, and capital outlay. Budget law allows transfers of budgeted funds between line-item categories as long as the appropriated funds in total are not exceeded; however, District policy requires Board of Directors approval for these types of transfers. It is illegal to overspend an appropriation in total.

There are a number of ways to amend the budget should it become necessary during the fiscal year. The process will vary depending on the nature and magnitude of the change. In all cases, action is required prior to an appropriated amount being exceeded. Some changes require the Board of Directors to pass a resolution; many changes require a supplemental budget; and certain changes require that a public hearing be held before the Board can make the change.

## SECTION 2: DISTRICT STRATEGIC GOALS AND STRATEGIES

### Mission and Goals

The District's mission is to conserve and protect soil and water resources for people, wildlife, and the environment. The District operates around six strategic goals to fulfill our mission: (1) improve water quality in our watersheds; (2) minimize erosion and build healthy soils; (3) enhance habitats, biodiversity and ecosystem function; (4) enhance the productivity and sustainability of working lands; (5) cultivate land stewards of all ages; and (6) ensure that the District is a vibrant agency. The District's annual budget supports our mission and strategic goals, and it is guided by our annual work plans. Our annual work plans address the long-term conservation opportunities and associated concerns that are discussed in our [Long Range Business Plan](#). In developing the budget, we considered both our long-term goals and the short-term factors (see Section 3) that influenced our annual work plans and our Key Performance Measures (see Appendix) related to fulfilling our mission, meeting our goals and making progress on our priorities.

### Racial Equity

In recognition of the need to address unconscious bias, remove cultural barriers in our programs and eliminate disparities in our work, the District's Board of Directors adopted a [Racial Equity Statement](#) for the District in 2017. The Racial Equity Statement contains the Board's vision for racial equity, the need for it, and how the District will hold itself accountable to it. Our practices within all program areas honor our ongoing efforts to make equity a central principle and component of all we do.

### Vision and Outcomes

The District provides educational, technical and financial conservation assistance to private landowners, businesses, schools, non-governmental organizations, residents and other members of the public within its service area; which consists of Multnomah County west of the Willamette River and all of Sauvie Island (including the Columbia County portion of the island) and a portion of the Bonny Slope area of the Tualatin Mountains in Washington County. Specific programs include conservation planning, healthy streams, urban habitats, neighborhood demonstration projects, early detection – rapid response and management and control of invasive species, rural farms, forest conservation, environmental education, healthy habitats, and wetland conservation. The District's signature project is the recently completed multi-million dollar Sturgeon Lake Restoration Project on Sauvie Island, in partnership with the U.S. Army Corps of Engineers, the Bonneville Power Administration, Columbia River Estuary Study Taskforce, Multnomah County, Metro Parks and Nature, Oregon Department of Fish and Wildlife (ODFW), the Oregon Wildlife Foundation and the Oregon Watershed Enhancement Board.

Our budget supports the following outcomes:

- More urban and rural landowners will be knowledgeable about invasive weeds and will be diligent about controlling them on their property.
- Horses, cows, goats and sheep will enjoy lush pastures and their feces won't pollute our streams and rivers.
- Our streams, rivers and watersheds will be healthier and support threatened and endangered fish species such as salmon and steelhead.

- Wildlife will thrive with ample food and shelter, and will co-exist with people on farms and in suburban backyards.
- Rare habitats, such as oak savannahs and prairies, ash swales, wet meadows and ponds will be appreciated and restored.
- Forests and farms will be stewarded thoughtfully and knowledgeably based on a conservation plan written around private landowner goals for owning the lands.
- Residents and neighborhoods will enthusiastically tackle small-scale stormwater catchment projects like de-paving or de-lawning, building healthy soils, native plant landscaping including planting trees and biodegradable erosion control.
- Pollinator hedgerow projects both big and small will abound and support our native bee populations and other pollinators such as moths and butterflies through a variety of native flora that bloom throughout the season from later winter to late fall.
- We'll enjoy more locally-grown food, farmed with methods that contribute to the long-term health of the land.
- Historically-underserved communities will be safe, comfortable and rich in healthy soil, clean water and diverse habitats.

Our work will only be successful if we are able to truly partner with all facets of the community, engage with respect, authentically listen, and have the courage to share decision making, control and resources with others. The District is committed to continuously evaluating and updating our programs to better serve communities of color. Our goal is to welcome, engage and include people of color in all facets of our organization.

## **Partners**

The District achieves our vision by working with people, communities, residents, landowners, agencies, schools, churches and other community organizations, non-governmental organizations and businesses. Partners (with example references to our shared interests) include, but are not limited to:

- ❖ Audubon Society of Portland (Backyard Habitat Certification Program, collaborative efforts, education and outreach, landowner outreach)
- ❖ American Forest Foundation (education and outreach)
- ❖ Bonneville Power Administration (Sturgeon Lake, wetland restoration)
- ❖ Build Local Alliance (forestry, working lands)
- ❖ Center for Diversity and the Environment (diversity equity and inclusion)
- ❖ City of Portland, Bureau of Environmental Services (BES) (invasive species, habitat restoration, volunteer support, funding support, stormwater management)
- ❖ City of Portland, Office of Equity and Human Rights (diversity, equity and inclusion)
- ❖ City of Portland, Parks and Recreation (forestry, canopy weeds, habitat diversity, green workforce development)
- ❖ Clackamas Soil and Water Conservation District (shared programs)
- ❖ Clean Water Services (invasive species, understory seeding)
- ❖ Coalition of Communities of Color (diversity equity and inclusion)



- ❖ Columbia Land Trust (Backyard Habitat Certification Program, collaborative efforts, education and outreach, landowner outreach)
- ❖ Columbia River Estuary Study Taskforce (CREST) (Sturgeon Lake Restoration & McCarthy Creek Wetland Reserve projects, other wetland restoration)
- ❖ Columbia Soil and Water Conservation District (shared programs)
- ❖ DEPAVE (stormwater, habitat restoration)
- ❖ East Multnomah Soil and Water Conservation District (shared programs)
- ❖ Forest Park Conservancy (forestry, habitat diversity, invasive species, green workforce development)
- ❖ Forest Park Neighborhood Association (invasive species, outreach, collaborative efforts)
- ❖ Forest Stewards Guild (landowner education, forest habitat)
- ❖ Friends of Marquam (volunteer support, landowner outreach, collaborative efforts)
- ❖ Friends of Terwilliger (volunteer support, landowner outreach, collaborative efforts)
- ❖ Friends of Tryon Creek (environmental and cultural education)
- ❖ 4-County Cooperative Weed Management Area (invasive species, education and outreach, mapping, technical collaboration)
- ❖ Green workforce development organizations such as Verde, Wisdom of the Elders and the Blueprint Foundation (diversity, equity and inclusion)
- ❖ Government Finance Officers Association (fiscal management, budgeting)
- ❖ The Intertwine Alliance (education and outreach, diversity equity and inclusion, oak habitats, strategic conservation planning, urban and residential programs)
- ❖ Lower Columbia River Estuary Partnership (wetland conservation)
- ❖ Linnton Neighborhood Association (invasive species, native landscapes)
- ❖ Metro Parks and Nature (forestry, oak mapping, strategic planning, habitat restoration, invasive species education, diversity equity and inclusion, education, collaborative efforts)
- ❖ Northwest Natural Resource Group (forestry assistance)
- ❖ Oregon Association of Conservation Districts (regional and statewide coordination)
- ❖ Oregon Bee Project (strategic planning, pollinator education)
- ❖ Oregon Department of Agriculture (ODA) (capacity, governance, authorities, water quality, invasive species)
- ❖ Oregon Department of Environmental Quality (water quality related grant funding)
- ❖ Oregon Department of Fish and Wildlife (Sturgeon Lake Restoration, Sauvie Island habitats, wildlife habitat related tax deferral programs)
- ❖ Oregon Department of Forestry (forestry, wildfire protection)
- ❖ Oregon iMap Invasives (invasive species, mapping)
- ❖ Oregon Invasive Species Council (invasive species)
- ❖ Oregon Parks and Recreation Department (invasive weeds, conservation education)
- ❖ Oregon State University Extension Service (Master Gardeners, Forestry, Agriculture, Soil, Oregon Integrated Pest Management Website, Soil School)
- ❖ Oregon Tree Farm System (education, forest certification)

- ❖ Oregon Wildlife Foundation (fundraising for conservation)
- ❖ Oregon Zoo Education Center (education, outreach)
- ❖ Pinchot Institute of Conservation (forestry, forest carbon offsets)
- ❖ PKS International LLC Community Engagement Liaison Services (community engagement, listening surveys, diversity, equity and inclusion)
- ❖ Portland State University, Center for Lakes and Reservoirs (monitoring)
- ❖ Portland State University, Mark O. Hatfield School of Government, Center for Public Service, Executive Master of Public Administration Program (urban program development initiative)
- ❖ River View Cemetery (forests, healthy streams, native habitats)
- ❖ Samara Group (education and outreach)
- ❖ Sauvie Island Center (education, organic farming)
- ❖ Sauvie Island Community Association (education and outreach)
- ❖ Sauvie Island Drainage Improvement Company (agriculture, habitat restoration, water quality)
- ❖ Sauvie Island Grange (education, community)
- ❖ Sauvie Island Habitat Partnership (invasive weeds, canopy weeds, habitat restoration, frogs, turtles, pond habitat, education, strategic planning)
- ❖ Scappoose Bay Watershed Council (wetland restoration, strategic conservation planning, moorages, community science & water quality, outreach & education)
- ❖ Skyline Ridge Neighbors (forestry, invasive plants, canopy weeds, education)
- ❖ Southwest Watershed Resource Center (habitat restoration, stormwater management, volunteer and neighborhood support)
- ❖ Special Districts Association of Oregon (administrative, legal and human resources)
- ❖ Tax Supervising and Conservation Commission (budgeting)
- ❖ Tryon Creek Watershed Council (healthy streams, restoration, invasive species)
- ❖ Tualatin River Watershed Council (water quality, fish passage, habitat restoration)
- ❖ Tualatin Soil and Water Conservation District (Soil School, shared programs)
- ❖ U.S. Department of Agriculture, Natural Resources Conservation Service (forestry, agriculture, wetlands, soil health, drainage and irrigation districts, oak woodland and prairie)
- ❖ West Willamette Restoration Partnership (invasive species, habitat restoration, volunteer, neighborhood support and collaborative efforts)
- ❖ Western Invasives Network (invasive species)
- ❖ Willamette Partnership (ecosystem services, market incentives for conservation)
- ❖ World Forest Institute International Fellowship Program (diversity equity and inclusion, forestry)

Partners having a significant impact on the budget are discussed in more detail in Section 3.

## **Summary of Programs**

### Conservation Planning

District conservationists work with landowners to develop individualized conservation plans that achieve their conservation goals in the context of their overall goals for their property. The plans identify practices to best protect soil and water quality, enhance plant and animal health, restore and maintain diverse natural habitats, and financially benefit landowners. The conservation planning process offers a number of tools landowners can use to meet these ends, whether they have forests, farms, or other types of properties.

### Rural Programs

#### *Farms*

The District partners with the U.S. Department of Agriculture's Natural Resources Conservation Service (NRCS), the ODA and Oregon State University (OSU) Extension Service to provide farmers the education, technical and financial assistance they need to prevent soil erosion, improve soil health and maintain water quality while operating their farm. Historically the District has worked mostly with produce, livestock and horse farms on Sauvie Island. This coming fiscal year, staff, board members, partners and community members will collaborate to broaden this with the aim to assist any farm, anywhere within the District – including urban farms and operations of all size and scope. As Portland continues to grow, both the population and “local food” movement have diversified. As a result, the farms and farmers within the district have changed in the last 10 years. A revamped farms program that also better aligns with the District's diversity, equity and inclusion goals is due.

The District helps farmers by providing comprehensive conservation plans and by getting them connected to financial resources to help them get started with soil building practices. These include NRCS Farm Bill conservation programs as well as small amounts of District funding. The District also assists livestock, horse barns and other animal operations with issues such as mud, compaction, invasive plants, forage production, and manure management. Farm and livestock owners also host District conservation projects implemented through Healthy Streams and Special Habitats programs.

#### *Forests*

The District is the lead management planning, technical and financial assistance provider to private non-industrial forest landowners in its service area. The overall goal is to help landowners understand their opportunities and responsibilities in owning forestland and encourage them to actively manage their forests to these ends so as to keep forests healthy and working. Specific programs focus on managing unhealthy overcrowded tree stocking through selective thinning that promotes the development of larger trees, the development of important structural wildlife habitats through dead and down wood and standing dead trees as well as practices that remove hazardous wildfire fuels and create defensible space in case of a wildfire. Diverse native trees and shrubs are planted in our restoration projects to offer habitat and resiliency. There's an emphasis on incorporating pollinator habitat into our forestry plantings. An emerging priority emphasis area in the north Tualatin Mountains – the Greater Forest Park Conservation Initiative – is centered around partnerships with the Forest Park Conservancy, Metro Parks and Nature, Oregon Department of Forestry, Oregon State University Forestry and Natural Resource Extension and other non-governmental forestry organizations.

## *Special Habitats*

By providing technical and financial assistance, the District helps private landowners enhance and expand regionally significant habitats such as Oregon white oak woodlands, savanna and prairie; wetlands and ponds. The assistance provides resources to conduct site preparation, secure planting materials, and provide maintenance to control competing vegetation until planted forbs, shrubs and trees become established. Oak habitat restoration includes removing competing vegetation such as overtopping Douglas-fir and invasive weeds and planting oaks and associated native understory and savanna / prairie species. The District works with partners such as NRCS to develop funding sources and projects for oak habitat and wetland restoration, enhancement and expansion on private lands. The District supports and participates in landscape level strategic conservation planning. The District works with partners through The Intertwine Alliance to map and prioritize Oregon white oak habitat across the region, develop a strategic plan for oak conservation, educate the public about the value of this declining habitat, offer educational workshops and publications, and financially support such efforts. The District also provides and supports other education and outreach related to rare or significant habitats, including habitat for pollinators, within the District.

The District assists private landowners who own wetland habitats, including floodplain, emergent wetland, wet prairie, off-channel habitat for salmon, and large ponds to enhance them. The District has a multiple-year Cooperative Agreement with NRCS to implement fish passage and restoration of riparian and other native habitats, including oak savanna and pollinator hedgerows on private land near the confluence of McCarthy Creek and the Multnomah Channel. The landowner also has requested a Compatible Use Agreement from NRCS so as to implement additional wetland restoration practices that will enhance the area for juvenile salmonid habitat. The District and our partner CREST is assisting with this effort.

The District collaborates with the Sauvie Island Habitat Partnership & Scappoose Bay Watershed Council to present educational workshops and create educational documents and plans – such as the newly published *Sauvie Island and Multnomah Channel Bottomlands Conservation Opportunities* resource -- around special habitats; to oversee wildlife surveys and construct basking structures for native turtles; engage the moorage community along the Multnomah Channel to monitor and protect water quality, and improve special habitats including pond, shoreline and oak. In partnership with SBWC and the moorage community, the *Living on the Water Guide* developed by the District and SBWC will be updated this coming fiscal year. The District also works directly with the floating community to identify and implement projects.

## *Healthy Streams*

Financial and technical assistance is provided to landowners for streamside (aka “riparian”) restoration to improve water quality, fish and wildlife habitat and to minimize streambank erosion. Focus areas for the District’s full-funding Healthy Streams Program include McCarthy Creek, Abbey and Rock Creek in the rural West Hills, and the canals and ditches on Sauvie Island. The District provides conservation planning, secures plant materials and other project supplies, directs and manages native plant establishment, does short to long-term maintenance -- including work by paid crews, and provides ongoing monitoring and adaptive management to maximize project success – all on behalf of enrolled Healthy Streams Program landowners. To optimize conservation results, priority for technical and funding support is given to projects that are larger, involve contiguous properties, and are in watersheds supporting salmonid fish or other priority wildlife or resource concerns. Other geographic

areas of interest for technical assistance and partial funding include the Crabapple watershed and shoreline areas of Multnomah Channel.

The District supports the Sauvie Island Drainage Improvement Company to identify and implement improved canal maintenance practices and to survey for aquatic invasive weeds. In Partnership with SBWC and with funding secured from DEQ, water quality monitoring has occurred on the canals on Sauvie Island and an operations & maintenance Plan for the canals was developed for SIDIC. Work on the plan will continue, as will research and partnership around funding opportunities for best management practices, such as light-tough sediment removal, bank stabilization and planting.

### Urban Programs

The recently completed Urban Programs Development Initiative conducted an analysis of urban programs centered on improvement strategies in the realms of program effectiveness, organizational development, policies and procedures, and equity. The analysis pointed to the need to increase efficiencies, ensure effectiveness, respond to external changes, and intentionally address equity and inclusion. Implementation of the Urban Program Development initiative requires a look back at program on-the-ground conservation results, internal work to address identified efficiency and effectiveness measures, a strengthened staff and board presence on policies and procedures that are directly impacting desired outcomes and a proactive approach to equitable and inclusive partnership and program development. The specifics of this implementation are discussed within each urban program area as described below.

#### *Canopy Weeds*

In cooperation with the Forest Park Conservancy and Portland Parks & Recreation, this program offers treatment of invasive canopy weeds ivy and clematis growing up trees in priority habitat areas in the Greater Forest Park Conservation Initiative area. To participate in this program residents must agree to keep these invasive plants from re-establishing on treated trees. Although this program has been in operation since 2012, we have not yet completed a holistic review of its effectiveness at reducing ivy seed spread, saving trees and engaging as well as educating residents. To review this program more fully, previously treated sites will be monitored and landowners will be surveyed regarding how this program impacted management of their land as well as how well they have been able to achieve their maintenance obligations.

#### *Demonstration Projects*

Urban Demonstration Projects provide technical and funding assistance to groups of neighbors, neighborhood associations, community organizations and businesses focused on engaging and educating community members through implemented conservation practices, interpretive signage and/or art. Examples include demonstration of stormwater projects, pollinator hedgerows and meadowscapes that also serve as education and outreach tools. Projects that proactively engage, collaborate with and/or are led by historically underserved communities and/or community members, including communities of color, will be prioritized for funding assistance. Past participants of this program will be surveyed to understand if their demonstration sites are actively maintained and used for education and engagement purposes. Identified opportunities to streamline processes and materials as well as collaborate on outreach will be pursued with the Education Coordinator and Communications and Outreach Manager.

### *Healthy Watersheds*

The District works with land managers including residential homeowners, renters, homeowner associations, commercial land managers and educational institutions to develop and implement plans focused on invasive plant removal, native plant establishment, stormwater management and wildlife enhancements. This program historically has prioritized funding and project management support to assist with implementation of these plans through a ranking of the overall acreage impacted, unique critical habitats protected or enhanced, adjacency to natural areas and/or other restored properties and number of residents impacted. Although this program has been actively providing planning and funding assistance since 2008, a holistic review of its objectives in removing invasive plants, installing native plants, enhancing wildlife habitat, improving stormwater outcomes and engaging as well as educating residents in land management has not been conducted. In response to the Urban Programs Development Initiative, a more holistic review of previously assisted sites ecological outcomes along with a survey of landowners assisted will be conducted. This work will be conducted in collaboration with culturally-specific green workforce development organizations to compliment diversity, equity and inclusion goals and to strengthen this effort's outcomes.

### *Urban Partners*

This program aims to support strategic partnerships to maximize our resources and minimize duplication with other organizations. The challenge the District faces when servicing residents, businesses and other private landowners in heavily urbanized areas of the District is that the number of individuals we would like to reach exceeds our capacity. The District addresses this challenge by providing funding to partner organizations that can leverage the District's efforts by efficiently and effectively performing on-the-ground work, as well as education, outreach and planning that supports our mission. The partner organizations which receive partner funding from the District are the Backyard Habitat Certification Program (BHCP), Forest Park Conservancy (FPC), Tryon Creek Watershed Council (TCWC), Southwest Watershed Resource Center (SWRC) and the West Willamette Restoration Partnership (WWRP).

The District serves as a funding and training partner for Portland Audubon and the Columbia River Land Trust in the delivery of the BHCP to urban residents that own an acre or less. This program provides onsite assistance and resources with a follow-up certification that participants have successfully controlled invasive weeds, installed native plants, enhanced wildlife habitat, and addressed stormwater impacts.

In addition to delivering the Canopy Weeds program, the FPC helps us focus on critical habitat corridor issues, invasive species, volunteer engagement and green infrastructure in northwest Portland.

The TCWC focuses on riparian and upland habitat restoration, water quality, invasive species, community engagement and fish passage in the Tryon Creek watershed through monitoring, watershed planning, workshops, volunteer work parties, community events and the coordination of partnerships.

The SWRC works with southwest Portland neighborhood associations, residents, businesses and community organizations to connect residents with technical information and referrals for invasive plant removal, native plant landscaping, stormwater management, natural gardening and other practices that enhance the health of the Fanno Creek, Tryon Creek, Stephens Creek, and other Willamette River sub-watersheds. The SWRC has taken on program coordination and implementation of the Stormwater Stars program which provides hands-on learning opportunities, community events

and online resources to residents focused on stormwater management practices suitable for Portland's challenging west hills.

The WWRP supports habitat enhancement and stewardship efforts in southwest Portland's Willamette River sub-watersheds to provide a key link in the wildlife corridor connecting Forest Park and Tryon Creek State Natural Area.

All partners are now actively working on equity outcomes and this program will continue to encourage such by including it as a ranking criterion.

### Invasive Species Programs

#### *Early Detection, Rapid Response (EDRR) Invasive Plants*

This program promotes removing invasive and noxious weeds through a prevention campaign combined with early detection and rapid response through surveying and timely control measures. Priority invasive targets are garlic mustard, false brome, knotweed, spurge laurel, giant hogweed, orange hawkweed, and common reed. The goal is to avoid introductions through prevention and eradicate where possible in the event of an introduction. If eradication is not possible, our goal is to contain or slow the spread of these weeds. This management strategy is designed to limit the spread of new infestations while populations are small and while establishment can be prevented. If prevention isn't possible, the most time and cost-effective way to manage new invasive weeds is through aggressive and targeted eradication control of newly discovered and localized infestations. District staff utilize a customizable mobile data collection platform application called "Fulcrum" to map and track all our EDRR survey, control and data records. These include absence or presence data, locations of infestations and extent, site data information, herbicide treatment information, annual status, and more. Additionally, staff and contractors alike use it as a historical record-keeping device to locate past sites and monitor them (and perform any necessary follow-up measures).

#### *Native Plant Revegetation*

These funds are used on cost-share projects with landowners to implement full-scale restoration plans, assisted by contractors, at priority sites where EDRR efforts are being performed. These projects implement written conservation plans that the Invasive Species Program Coordinator creates with landowners and require a 50-50 cash/in-kind match that is provided by the participating landowner. Another aspect of this program, which aims to expand revegetation efforts beyond what the District can implement through contractors, is to provide landowners that have an EDRR treatment site with access to restoration kits such as native plants and native seed mixes. Landowners are expected to perform any additional site preparation and are responsible for sowing the seed and/or installing the native plants.

#### *Partner Support*

Three partner organizations currently receive funding support through the Invasives Species Program: iMap Invasives, OSU Extension Service's non-agricultural Integrated Pest Management *Solve Pest Problems* website, and the 4-County Cooperative Weed Management Area.

## Education Programs

Educational efforts include installing demonstration gardens and habitats in high visibility areas at schools and community centers as well as delivering conservation education through workshops, training, and other events such as Soil School, Weed Watchers, Tree School and Stormwater Stars. The District is continuing a partnership with the Oregon Zoo Education Center to design and implement interpretive programs that provide information to the public on a wide array of conservation-related topics including but not limited to invasive species identification and removal, native plants for pollinators, oak and other habitat restoration, soil health, and clean water practices.

The District has also been participating on the advisory committee for the Oregon Bee Project's strategic planning effort, and participating in their Oregon Bee Atlas project to identify and map native bees via a community science campaign. The District also aims to provide funding support to key environmental education organizations such as Friends of Tryon Creek and Sauvie Island Center, which is building sustainable capacity to provide farm education for schools and will be participating in our 75<sup>th</sup> Anniversary Celebration at Howell Territorial Park on Sauvie Island.

## Sturgeon Lake Restoration Project

Situated between the Columbia River and Multnomah Channel the 3,200 acres of Sturgeon Lake forms the core of the Sauvie Island Wildlife Area managed by the Oregon Department of Fish and Wildlife (ODFW). Sturgeon Lake is important habitat for endangered salmon, sturgeon and Pacific lamprey and is an integral part of the Pacific flyway for pacific coast migratory waterfowl. It is one of the premier natural and biologically significant aquatic and wildlife habitats in the state. The lake is threatened with sediment infill due to the lack of sediment flushing during tidal floods and high flow events. Sturgeon Lake is identified in the Oregon Conservation Strategy as a "Conservation Opportunity Area" and restoring hydrological flows from the Columbia River to the lake for salmon habitat restoration is specifically named as a state strategy. Principal partners in the project are the Bonneville Power Administration, the US Army Corps of Engineers, the Columbia River Estuary Study Taskforce, PC Trask and Associates, the Oregon Department of Fish and Wildlife, the Oregon Department of State Lands, Multnomah County, the Oregon Wildlife Foundation and four cooperating private landowners.

After over a decade of partnership building, planning, fundraising, and engineering, and just over four months of construction, the Dairy Creek channel reopened to tidal flow between the Columbia River and Sturgeon Lake on Sauvie Island. The Columbia River Estuary Study Taskforce (CREST) oversaw the construction of the project to replace two failing culverts under Reeder Road and remove the sediment and debris clogging the channel. CREST awarded the final design and engineering to Wolfe Water Resources (who subcontracted the bridge design to HDR Inc.) and awarded the construction contract to Elting Northwest, Inc. On November 1, 2018 the new bridge became open to all vehicle, bicycle, and pedestrian traffic and on the following day, November 2<sup>nd</sup>, for the first time in 22 years, the tidally influenced waters of the Columbia River were once again fully connected to Sturgeon Lake.

Despite these milestones, work necessary to complete the project will continue in FY 2019-20. Specifically, the District needs to budget for a contingency irrigation reconfiguration project for one of the cooperating primary landowners should the District's primary reconfiguration -- the digging of an irrigation well -- not fully meet the needs of the landowner. The District's implementation of the contingency project -- should it be needed -- was a condition of the landowner's consent to the project. The District also needs to negotiate a permanent access agreement with the Oregon Department of



State Lands (DSL) so as to be able to perform monitoring and maintenance of the Dairy Creek channel below the ordinary, tidally influenced high water mark. Our current authorization – set in a temporary access agreement with DSL – is set to expire on July 1, 2020. The District needs to budget further the necessary due diligence and attorney work.

Since 2017, the District and CREST have been actively restoring approximately 13 acres of riparian habitat along Dairy Creek. This work will continue during the FY 2019-20 budget year. Some of the costs for this work will be reimbursable by an Oregon Watershed Enhancement Board Local Small Grant obtained by the District. Both CREST and the District will monitor those plantings for survival as well as to observe natural wetland plant regeneration within the Dairy Creek channel.

The District is also partnering with the Scappoose Bay Watershed Council (SBWC) to conduct biennial aquatic invasive plant surveys within Sturgeon Lake. SBWC is also leading the coordination of community science volunteers to monitor the Lake and surrounding areas throughout the year. As part of the overall monitoring effort, ODFW and the US Army Corps of Engineers will be installing a Passive Integrated Transponder (PIT) tag array at the Reeder Road crossing for the purpose of monitoring juvenile salmonid fish access to Sturgeon Lake from the Columbia River. CREST and the District will be responsible for the management of the data collected from the PIT tag array.

### Support for Conservation Programs

#### *Communications & Outreach*

The District's communications and outreach program greatly enhances our ability to remain a vibrant agency. We regularly distribute success stories and information about conservation opportunities and practices to media outlets, neighborhood organizations, partner agencies, and residents of the District. Our communication tools include social media, website, email newsletters, annual reports, news releases, workshops, articles in community newsletters, and outreach activities including event tabling, presentations, and public speaking engagements. The District's 75<sup>th</sup> anniversary falls during fiscal year 2019-2020, and to mark the occasion we are producing a special event and a collection of oral histories about the District.

The communications and outreach program engages partner organizations and individuals in a collaborative effort to educate and inform District residents about conservation issues facing them and their communities. The District produces a wide variety of products to help educate residents, landowners, and homeowners about priority program areas and conservation activities, including books, brochures, flyers, mailers, videos, banners, signs, stickers, and other creative materials.

The communications program maintains consistent conservation messaging and operates in a strategic manner to reach constituents who will benefit from District conservation education and practices.

#### *Administrative Operations*

To maximize efficiencies and staff capacity, the administrative operations team - consisting of the Office Manager, Controller, and District Manager - provides grants and contracts administrative support, coordination of vehicle fleet needs, and up-to-date technology for use in the office and out in the field. To ensure a productive, rewarding and safe work environment, the District offers competitive benefits and supportive human resources policies and programs. This support is critical to ensuring that the District continues its vital conservation work and remains a vibrant agency.

## **Fiscal Oversight**

The District Manager, Controller, and Board Treasurer regularly monitor accounts and compare expenditures to limits authorized in the budget. Each month, the Board of Directors reviews the District's financial statements and obtains explanations for any variances from budget or changes in financial position. Financially, the District has done a good job of substantially increasing activity while controlling costs.

All District funds are held in Qualified Public Depositories approved by the Oregon State Treasury: the Oregon State Treasury's Local Government Investment Pool (LGIP) and US Bank. In general, long-term savings are held in the LGIP account, while short-term operating capital is held in the US Bank account.

The District's financial statements are audited annually. The audit report is filed with the Oregon Secretary of State, Division of Audits. A strong and effective system of internal controls is employed to protect the public funds entrusted to the care of the District.

## **Special Initiatives**

### Diversity, Equity and Inclusion

Our Diversity, Equity and Inclusion work began in 2014 with an introductory equity training. In 2016, the board of directors approved a standing Diversity, Equity and Inclusion (DEI) committee comprised of both board and staff with a dedicated budget cost center beginning in FY 2016-17. In 2017, the DEI Committee began work on developing an equity lens and launched its initial draft in March 2018. An equity lens is a series of questions that are applied to a particular policy, program or procedure, that when asked and answered, reveal if that policy, program, procedure or service leads to equitable outcomes. The whole idea behind using an equity lens is to slow down the decision process so as to ensure the removal of bias and disparities that result in barriers or unfavorable outcomes to historically marginalized cultures, communities and peoples. Since its launch, the District has conducted both staff and Board trainings in using the equity lens. Operationally, the use of the equity lens has become standard in our development, review and implementation of District hiring practices for both temporary and permanent staff positions.

Besides our work on developing equitable hiring practices, other diversity, equity and inclusion activities include introductory work in demographic analysis, developing relations with new partners and efforts to become more culturally responsive in our program delivery with significant gains being achieved in our urban programs through the Connect SW PDX project. This work will continue during FY 2019-20.

### 75<sup>th</sup> Anniversary Celebration

In September of 2019, the District will be celebrating our 75th anniversary with a "Sauvie Island Jubilee" at Howell Territorial Park on Sauvie Island in recognition of the District's origins as the Sauvie Island Soil and Water Conservation District in 1944. The goals of the celebration are:

- 1) Honor the work of the District and our partners and teach others about our role in contributing to the environmental, economic and social health of the region;

- 2) Strengthen partnerships;
- 3) Reflect the beauty, spirit and history of Sauvie Island; and
- 4) Create a friendly space that attracts a diverse range of participants.

The Sauvie Island Jubilee will be a free, public event with booths, exhibits, and activities that educate and celebrate the broad and interconnected cultural, economic and ecological services that our work provides. The event embodies the spirit of the former Wintering-In Harvest Festival held annually on Sauvie Island with local food, music, and fun for all ages. Metro Parks & Nature is kindly re-opening the first floor of the historic Bybee-Howell House where we will show oral history videos about the District. Bybee-Howell House was formerly the home of Thomas Howell, a largely self-taught botanist who made an important scientific contribution to the region by publishing the first “Flora of the Pacific Northwest.” The FY 2019-20 budget dedicates a portion of the funding for the event to equity so as to ensure access and a welcoming environment for participation by historically marginalized or underrepresented groups in our district as well as to recognizing the many contract laborers and workforce development employees who accomplish a great deal of our conservation work.

The organizing of the celebration is a great opportunity to reengage, build, and further a sense of community that was celebrated with past Wintering-In festivals. To this end, we have reached out to and are working with local community organizations including the Sauvie Island Community Association, Sauvie Island Center, Sauvie Island School, and the Sauvie Island Grange. Metro Parks and Nature granted us a permit for the event and are contributing in-kind staff and equipment support. The Oregon Historical Society, which owned and operated Bybee-Howell House as a pioneer museum for decades, is generously providing historic photographs for house exhibits. OSU Extension is coordinating a variety of fun and educational activities for all ages as well as a corn-on-the-cob fundraiser for the Sauvie Island School. The Sauvie Island Center is creating a scavenger hunt for kids. Safety and managing island traffic are also of primary importance, and we are working with the Sauvie Island Fire Department, Multnomah County Sheriff's Office and Oregon State Police to make necessary arrangements.

Sauvie Island is an important place for its current residents and many throughout the greater Portland region, but it is also sacred ground for regional American Indian tribes. The Multnomah tribe had villages throughout the island. The Confederated Tribes of the Grand Ronde and possibly other tribes from around the area will participate in the Sauvie Island Jubilee.

#### Long Range Business Plan (LRBP) Update and Financial Sustainability Index Project

Since passage of the District's tax levy in 2006, the District has grown into a high caliber organization that is fully staffed with five full-time Conservationists and a part-time Senior Conservationist (0.90 Full Time Equivalent (FTE)), a full-time District Manager, a full-time Office Manager, a part-time Controller (0.80 FTE), a part-time Communications and Outreach Manager (0.625 FTE), and a permanent full-time Seasonal Conservation Technician eight months of the year. In addition, during the busiest six-month period of the year, the District hires a half-time Field Intern and a half-time Field/GIS Intern to provide more capacity to implement our conservation programs.

Over this same period, the District has experienced a slower growth in revenues compared to our growth in personnel costs; for the first time, our growth in revenues will not even cover necessary cost of living increases in salaries. This trend, combined with the cost overruns for the Sturgeon Lake Restoration Project, has resulted in the District having to cut into the core of priority conservation program projects and services; this means that for us to deliver the level of service we have planned in

our annual work plans, the District will need to obtain more outside funding through grants and other sources of revenue. The situation calls for the District to strategically evaluate and prioritize the breadth of conservation programs and services we can provide and the level of staffing the District can financially sustain over the long run.

The District will conduct this evaluation through an update of the District's LRBP and through completion of the Government Finance Officer Association's Financial Sustainability Index protocol. So as to ensure alignment of the strategic direction of our programs with long-term financial sustainability, the two efforts will be combined into a single integrated project. The FY 2019-20 budget has dedicated funding to hire a consultant with the appropriate expertise needed to help develop and facilitate our LRBP update and to hire Community Engagement Liaisons to allow us to be culturally responsive in our work and to solicit meaningful participation in this process by historically marginalized or underrepresented groups in our district.

Another key component of our LRBP work this fall will be a deeper consideration of the effects of climate change on our conservation planning. The region's changing climate highlights the importance of the District's efforts to create healthy and resilient ecosystems, including enhanced upland and riparian forest, floodplains, wet meadow, marsh and other wetland and aquatic habitats, all of which can help provide flood relief and store carbon. We'll be evaluating ways to help the farmers in our District become more resilient to climate change and its effects on crop production, water usage, rotations, species selection, soil management, and pest control, as well as find solutions to erosion on slopes and in farm fields. The increased wildfire risk in the Pacific Northwest will increase the importance of creating healthy forests in the District and empowering residents and communities to plan and implement wildfire risk reduction practices. We will also work with woodland owners to manage healthy and diverse forests that store carbon to slow climate change as well as build resiliency to the deleterious effects of warmer temperatures, altered hydrologic regimes, and increased insect, pathogen and invasive species pressure.

## **SECTION 3: BUDGET AND ASSUMPTIONS**

### **Budget Preparation**

The proposed FY 2019-20 budget is in balance and complies with Oregon Local Budget Law, state statutes, and generally accepted accounting principles. The budget supports implementation of the District's annual work plans and programs for FY 2019-20 as summarized in Section 2 and is consistent with the District's mission, vision, and desired outcomes. It is prepared on a modified accrual basis (recognizing revenues when they become available and measurable, and recognizing expenditures when liabilities are incurred), which is consistent with how the District's audited financial statements are prepared.

### **Key Short-term Factors Guiding Development of Budget**

Although the local economy and property values remain healthy with continued growth, albeit at a slower pace than in recent years, the District continues to have pressure on its costs due to escalating PERS rates, the correction of wage disparities as required by the Oregon Pay Equity Law, and the need to cover cost of living increases and reward performance. As discussed under the Long Range Business Plan (LRBP) Update and Financial Sustainability Index Project description in Section 2 and under our Priorities and Issues for the Upcoming Year below, the District needs to take steps to ensure that our growth in personnel costs does not eventually outpace our property tax revenue growth.

Although one-time in need, the large shifts in resources taken from our conservation programs to cover cost overruns incurred for the Sturgeon Lake Restoration Project (\$95,000 in the current year and \$100,000 in the coming year) have not only impacted these programs, but also eaten into available built-up reserves from prior budget years. The result is that deferred conservation projects and some new initiatives can only occur if the District is successful in obtaining outside funds. In addition, some important conservation program areas such as early detection, rapid response for invasive weeds, healthy streams, and special habitats, canopy weeds and education partner funding had to be reduced in order to find resources to cover cost of living increases in salary, our commitments to equity pay adjustments, and special initiatives such as the 75<sup>th</sup> Anniversary Celebration and the outside consulting resources necessary to support the Long Range Business Plan update.

### **Priorities and Issues for the Upcoming Year**

Although our annual budget is by its nature focused on the short-term, our priorities reflect not just the immediate issues of the next year, but also include factors effecting the long-term health of the District and the communities it serves. Our priority this fall we will be updating our LRBP, which expires on December 31, 2019. Integrated with that update is our work on the financial sustainability index project we began in 2017 with the help of the Government Finance Officers Association (GFOA). As we work on our LRBP and map out a plan through 2025, our intent is to apply a financial sustainability lens to all our decisions with the hope of enhancing our resiliency in the face of budget shortfalls and the next recession.

### **Budget Documents and Funds**

Budget documents are provided to the Budget Committee and to the public for their review. The District is required to submit the final budget on standardized Local Budget (LB) forms prescribed by the Oregon Department of Revenue.

The LB forms contain FY 2016-17 and FY 2017-18 audited financial results, FY 2018-19 Adopted Budget, FY 2018-19 Estimated Actuals and FY 2019-20 Proposed Budget. The District has a General Fund and

one Special Fund for the Sturgeon Lake Restoration Project (Sturgeon Lake Fund). The purpose of the General Fund is to account for operations and general services of the District; it can be used whenever a specific type of fund is not required. The Sturgeon Lake Fund is used to record revenue dedicated for the specific expenditures related to the Sturgeon Lake Restoration Project. Resources and requirements within each fund are equal, creating a balanced fund.

Specific forms submitted by the District are: General Fund Resources (Form LB-20); General Fund Requirements (Form LB-30); Special Fund (Sturgeon Lake) Resources and Requirements (Form LB-10). Each is described below.

### **General Fund Resources (Form LB-20)**

The primary source of revenue for the General Fund is the District's permanent taxing authority established by voters in the 2006 General Election. The maximum permanent rate limit is set at 7.5 cents per \$1,000 of assessed value. After the taxes extended amount is reduced for estimated Measure 5 tax revenue compression (due to Portland's expansive urban renewal program costs and increases in other local government spending) and a presumed delinquency rate of 4.55%, the property taxes estimated to be received are approximately \$1,597,000. All assumptions are in a range consistent with prior years and have been reviewed by Multnomah County's Tax Supervising & Conservation Commission (TSCC).

<b>Assumptions</b>	<b>FY 2019-2020</b>	<b>Source</b>
<b>Actual Prior Year Assessed Value</b>	\$ 22,556,900,311	Multnomah Co. Assessor
<b>Assumed Growth</b>	3 %	TSCC
<b>Calculated Assumed Assessed Value</b>	23,233,607,320	
<b>Taxes Extended using Permanent Rate</b>	1,742,521	\$0.075/\$1,000 AV
<b>Assumed Measure 5 Compression</b>	(69,701)	TSCC – increasing at a higher rate in coming years
<b>Calculated Taxes Imposed</b>	1,672,820	
<b>Assumed Discount and Delinquency Rate</b>	(76,113)	TSCC - 4.55 %
<b>Property Taxes Estimated to be Received</b>	\$ 1,596,707	

The LB-20 Resources page of the General Fund begins with the projected working capital on 7/1/19, conservatively estimated to be \$948,298. This figure is calculated by taking current cash balances and adding projected revenue and subtracting estimated spending from the current date through 6/30/19. From the expected working capital at 6/30/19, the portion allocated specifically to the Sturgeon Lake Special Fund is subtracted to arrive at the amount expected to be in the General Fund at 7/1/19.

Additional resources added to the beginning working capital are property tax revenues levied in earlier years of \$29,414, which are estimated to be received only in FY 2019-20, and interest of \$24,000 earned on LGIP funds.

Other resources include grant funding and cooperative agreements as well as contributions received from partners for shared projects. These funding sources are detailed below.

Type of Funding		FY 2018-19	FY 2019-20	Increase/ (Decrease)	%	Funding Description
<b>Federal</b>	NRCS Forestry	24,030	15,019	(9,011)	(37)	Conservation Innovation Grant to assess forest health in part by focusing on understory species and shrub cover
	NRCS Rural	25,212	14,651	(10,561)	(42)	Cooperative Agreement to fund the District's implementation of practices under the federal Wetland Reserve Program (WRP) for a lower McCarthy Creek WRP easement property
	BLM Forestry	6,477	6,477	0	0	Assist Upper East Fork McKay watershed woodland owners with habitat health
	Sub-total	55,719	36,147	(19,572)	(35)	
<b>State</b>	ODA Rural	78,488	78,488	0	0	Support water quality programs, including riparian habitat enhancements, technical projects and administrative costs
	OSWB Invasive Species	32,300	34,638	2,338	7	Fund garlic mustard control programs
	ODF	36,797	-	(36,797)	(100)	Grant for Greater Forest Park Ecosystem
	OWEB Rural	-	22,500	22,500	-	Oak habitat enhancement and riparian project in Crabapple Creek watershed
	OWEB Urban	-	41,030	41,030	-	For collaboration with culturally-specific green workforce development organizations
	Sub-total	147,585	176,656	29,071	20	
<b>Local/ Regional</b>	Metro Urban	10,000	22,500	12,500	125	Has included Metro's Nature-in Neighborhoods grants; future funding to strengthen urban habitat restoration outcomes and engage/ educate residents
<b>Other</b>	PP&R, BES, workshops attendees, misc.	13,050	15,350	2,300	18	Projected reimbursements from workshops and trainings provided by the District and also from contributions to WWRP
<b>Total</b>		226,354	250,653	24,299	11	

Not all of the above additional resources have necessarily been secured. The FY 2019-20 budget has identified those expenditures that are conditioned on receiving these additional grant resources so should the additional resource not be obtained, those corresponding expenditures will not be authorized as part of the fiscal oversight of the budget.

**General Fund Requirements (Form LB-30)**

Categories in the General Fund requirements and their increase from prior year's budget are reflected in the table below and discussed in detail within each section.

Category	FY 2018-19	FY 2019-20	Increase/ (Decrease)	%	Reason for Change
<b>Personnel services</b>	1,187,610	1,250,250	62,640	5	2.5% COLA; varied increases resulting from Oregon Pay Equity Law analysis; PERS increase; all partially offset by decrease in insurance expense
<b>Materials &amp; services: Administrative Operations</b>	253,590	283,650	30,060	12	Additional spending on 75 <sup>th</sup> Anniversary celebration and necessary consulting services and use of Community Engagement Liaisons in support of the long-range business plan update/financial sustainability index project
<b>Materials &amp; services: Conservation Programs</b>	431,571	467,395	35,824	8	Increase in grant funded conservation work; see detail by conservation area in table below
<b>Capital outlay</b>	7,500	7,628	128	2	Only minimal IT replacements or upgrades planned
<b>Transfer Out to Sturgeon Lake Fund</b>	95,000	100,500	5,500	6	Contingency irrigation system reconfiguration costs, continuing legal fees to secure permanent access for monitoring and maintenance and vegetative management costs.
<b>Contingency</b>	10,000	50,000	40,000	400	Replaces amounts used in FY 18-19; proposed amount considered prudent
<b>Reserve for future expenditures</b>	25,000	-	(25,000)	(100)	Unable to save for future opportunities due to current year cost pressures
<b>Unappropriated ending fund balance</b>	760,354	760,544	190	-	Used to cover the District's cash flow needs prior to receipt of tax revenues, spending in fall 2020 expected to be similar to fall 2019 balance adequate given stable spending

Personnel services

Personnel services of \$1,250,250 include salaries and wages of \$872,919, health and workers' compensation insurance of \$113,769, PERS retirement plan contributions of \$174,579, and payroll taxes of \$88,983.

*Staffing:*

The budget includes seven full-time and four part-time permanent staff, as well as two to four part-time seasonal conservation interns, resulting in a .5 FTE increase in staffing levels for FY 2019-20.



The majority of the District's employees (Senior Conservationist, Urban Conservationist, Invasive Species Coordinator, Rural Conservationist, Forestry Conservationist, Conservationist and Education Coordinator, Seasonal Conservation Technician, and Field/GIS Interns) are engaged in providing conservation services as outlined in Section 2. The Field/GIS interns assist staff with planting and weed eradication work in the spring and fall and with GIS (Geographic Information System) data, database management and technical analyses during the summer.

The remaining four employees (District Manager, Controller, Office Manager, and Communications & Outreach Manager) provide management and administrative services, ensuring that the organization is fully compliant with all laws and regulations pertaining to public funds, including having a comprehensive system of fiscal and budgetary controls and reporting functions; additional support services include help with planning workshops and events, as well as creating marketing and educational materials.

All work occurs under the supervision of the District Manager, who reports to the Board of Directors and supports the District's conservation mission by working directly with a wide variety of organizations and individuals, such as local, regional, state and federal government agencies, non-profits, citizens, community groups, elected officials, and private businesses, to move forward the goals and initiatives of the District. In particular, the District Manager is instrumental in all fundraising goals and overall program management related to the multi-year Sturgeon Lake Restoration Project. The District Manager also contributes directly to all program areas (conservation programs as well as administrative and operational areas).

The District operates under the principal of shared leadership through the District's Leadership Team which is comprised of the District Manager, Controller, Communications & Outreach Manager, Office Manager and Senior Conservationist.

*Summary of full-time equivalent (FTE) employees:*

<b>Category</b>	<b>FY 2017-18</b>	<b>FY 2018-19</b>	<b>FY 2019-20</b>
<b>Administrative staff, including communications</b>	<b>3.4</b>	<b>3.4</b>	<b>3.4</b>
<b>Conservation staff, including seasonal workers</b>	<b>7.4</b>	<b>7.4</b>	<b>7.9</b>
<b>Total</b>	<b>10.8</b>	<b>10.8</b>	<b>11.3</b>

*Merit, Step, and COLA Wage Increases:*

As the basis for determining a cost of living adjustment (COLA), we use the Bureau of Labor Statistics' published CPI for Urban Wage Earners and Clerical Workers in the West, size class A, (CPI-W), which is 2.5% for the last 12-month period. The overall increase of 8% in Salaries and Wages also reflects adjustments related to the Oregon Pay Equity Law, but no merit or step increases due to an effort to control rising personnel costs.

*Health and Workers' Compensation Insurance:*

For employee benefits, the budget assumes the overall health care benefit cost, including contributions to employees' Health Reimbursement Arrangement Voluntary Employees' Beneficiary Association (HRA VEBA) accounts, will decrease by 39%. Estimates are based on our insurance agent's estimates of favorable market factors when our plans are renewed on July 1, 2019, and on estimates of employees enrolled. Employees use

their HRA VEBA account for qualified out-of-pocket medical care costs that are not covered by the medical plan. The current and proposed employer contribution is \$70 per month per permanent employee eligible for medical coverage plus an incremental amount determined by the difference between the cost of the medical plan that is the most expensive to the District and the plan chosen by the employee. Additionally, staff made a group decision to contribute, beginning on July 1, 2019, \$25 per month from their pay to HRA VEBA; the budget proposes an increase in everyone's pay by this amount, with an overall impact of approximately \$4,000 on personnel costs. Workers' Compensation insurance rates are not expected to increase.

#### *Public Employees Retirement System (PERS):*

The District participates in PERS, a cost sharing, multiple-employer defined benefit pension plan administered by the State of Oregon. PERS funding policy requires the District to contribute monthly at an actuarially determined rate, established biennially. These contributions, expressed as a percentage of covered payroll, are intended to accumulate sufficient assets to pay retirement benefits when due. The budget increases for PERS reflect the rates that will take effect July 1, 2019. Rates are locked for two years. The FY 2019-20 budget assumes the District will be contributing 24.51% for Tier I / Tier II employees (those hired before August 28, 2003) and 20.21% for all other eligible employees hired after August 29, 2003. The District is budgeting \$174,579, an increase of 38% from the prior year amount of \$126,780; of the increase, 8% is due to wage increases and 29%, or \$37k, is due to rate increases.

Oregon lawmakers passed Senate Bill 1566 in March 2018 to help public employers defray rising public pension costs. The Bill provides incentives for employers to make extra, one-time contributions to pay down unfunded liabilities faster. The Bill establishes a fund that will match by 25 cents on the dollar any extra contributions an employer makes to the pension fund beyond required contributions. Those extra contributions and the state funds would go into employers' individual accounts, be invested alongside existing pension assets, and be gradually drawn down to reduce those employers' contributions. This would be a low-risk plan, which, barring a severe stock market downturn, would result in an immediate 25 percent return for the District on extra contributions. The problem is that the side accounts are only minimally funded as of April 2019 and lawmakers are still working on the details of implementation. So far, the only identified source of revenue for the employer incentive fund is a portion of the state tax revenue generated by repatriation of corporate profits due to recent changes in the federal tax code. Those revenues are not expected until after July 1, 2021, and they may only amount to tens of millions of dollars, which would be inadequate to offset much PERS costs. The District will be evaluating potential extra contributions as part of its Long Range Business Plan update and its financial sustainability project. No action is expected until the fall of 2021.

#### *Payroll Taxes:*

Employer payroll taxes increased by 8%, in proportion to salary and wage increases.

#### Materials and Services - Operations

Materials and services is the broad expense category that supports general operations and conservation programs and services. Within general operations are expenses such as rent, computer and IT services, vehicle maintenance, insurance, telephone and internet services, staff and board training, audits, printing, signage and displays, all of which will remain relatively stable. New in the proposed budget are funds of \$30,000 for consultation services to help develop and facilitate the process of updating our Long-Range Business Plan, which expires this year. The process will include working with Community Engagement Liaisons to allow us to be culturally responsive in our work and to solicit meaningful participation in this process by historically marginalized or underrepresented groups in our district. There is also an increase of \$7,900 in event costs for

the District's 75th anniversary celebration in September 2019. Both of these initiatives are described more fully in Section 2.

#### Materials and Services – Conservation Programs

The remaining Materials and Services costs are dedicated to conservation programs and services and represent 68% of the costs in this category. The table below highlights changes from the prior year. See section 2 above for more details about these conservation programs and services.

Conservation Area	FY 2018-2019	FY 2019-2020	Increase / (Decrease)	%	Reason for Change
Rural Farms and Healthy Habitats and Streams	60,462	83,651	23,189	38	Increase in grant supported riparian projects as well as oak and other mixed woodland savanna enhancement projects. Increase subject to the District's ability to obtain grants.
Forests	73,338	58,661	(14,677)	(20)	Completion of ODF Greater Forest Park Ecosystem grant and budget cuts that prevented taking on new non-grant funded projects.
Urban	54,250	102,580	48,330	89	Resumption of the canopy weed program in and around Forest Park. Roughly 85% of the increase is dependent on securing outside grant funding for the urban healthy watershed restoration program.
Invasive Species	87,600	71,800	(15,800)	(18)	Cuts to the EDRR and restoration program areas due to budget constraints.
Education	16,220	14,400	(1,820)	(11)	Planned suspension of the pollinator monitoring program.
OSU Ext. Support	9,500	7,500	(2,000)	(21)	Planned reduction in computer support for Master Gardeners.
Partner Support	130,201	128,803	(1,398)	(1)	Partner support remaining stable.
Total	431,571	467,395	35,824	8	If necessary grant resources are not obtained, there could be an overall decrease in program expenditures.

#### Capital outlay

Capital outlay is for purchases of capital assets, defined as assets that have a value of \$2,000 or more and have a useful life of more than one year. Capital outlay requirements in the past have primarily been for office equipment (computers and other technology related upgrades) and vehicles. The proposed capital outlay budget for FY 2019-20 is minimal, \$7,628, as no vehicle purchase or significant technology purchases are planned. As part of our LRBP update this fall, we will be considering a policy of replacing our gasoline powered

vehicles with electric vehicles in future years; until policy direction is decided, we will be repairing our current vehicles as necessary and may see an uptick in maintenance expense in the coming year.

### Contingency

The Contingency category is supported by Oregon Local Budget Law to manage unforeseen or unexpected operating situations. Contingency funds can be used to cover shortfalls in any of the General Fund budget categories described above. We don't expect to use contingency funds, but \$50,000, an amount considered prudent, is included to manage unforeseen events.

### Debt

The District has no debt and does not anticipate taking on any debt obligations in the near or long-term future.

### Unappropriated ending fund balance

This category represents the amount of money the District needs to cover expenses after the new fiscal year ends and before substantial tax revenue is received. This period is from July 1, 2020 until tax revenue is received in mid-November 2020. It is called "unappropriated" because we cannot appropriate funds beyond the end of the fiscal year, but we know we will need to have those funds to meet expenses for the July-through-mid-November 2020 period.

The unappropriated ending fund balance for a given fiscal year is carried forward as a Resource (cash on hand or working capital) to begin the following fiscal year. For the General Fund, the unappropriated ending balance for FY 2019-20 is budgeted at \$760,544, representing cash flow requirements and anticipated expenditures for the first four and a half months of the following fiscal year (FY 2020-21), assuming spending of approximately \$169,000 per month.

### **Special Fund Resources and Requirements – Sturgeon Lake (Form LB-10)**

The Sturgeon Lake Fund is a separate distinct fund from the General Fund. The purpose of the fund is to clearly identify, track and account for external funds contributed to the Sturgeon Lake Restoration Project by third party partners such as Metro Parks and Nature, the Oregon Wildlife Foundation, Multnomah County and the Oregon Department of Fish and Wildlife (ODFW). A portion of the Sturgeon Lake Fund contains specifically assigned amounts in an account called the Sturgeon Lake Stewardship Account. The Sturgeon Lake Stewardship Account was established in 1993 by a Memorandum of Agreement with the Oregon Department of Environmental Quality, the ODFW and the District for the purpose of performing maintenance and monitoring of the Sturgeon Lake Restoration Project. The Sturgeon Lake Stewardship Account has remained a separate and dedicated account since then.

Table 1 shows the sources and the amounts of the non-federal funding over multiple year for the Sturgeon Lake Fund, reflecting the total amount of \$1,335,945 raised by the District and partners. Of this amount, \$1,160,076 will have been expended through June 30, 2019.

<b>Table 1: Sources of Funding for Non-Federal Funding</b>	<b>Total</b>	<b>Prior to 6/30/16 Actuals</b>	<b>FY 2016-17 Actuals</b>	<b>FY 2017-18 Actuals</b>	<b>FY 2018-19 Budgeted</b>	<b>FY 2019-20 Budgeted</b>	<b>Future Ongoing O&amp;M</b>
WMSWCD - General Fund	\$ 197,918	\$ 2,918	\$ -	\$ -	\$ 95,000	\$ 100,000	\$ -
WMSWCD - Sturgeon Lake Stewardship Fund	\$ 86,269				\$ 10,400	\$ 16,000	\$ 59,869
Oregon Watershed Enhancement Board	\$ 60,758	\$ 31,875	\$ -	\$ 9,661	\$ 19,222	\$ -	\$ -
Multnomah County	\$ 300,000	\$ -	\$ -	\$ 110,445	\$ 189,555	\$ -	\$ -
Metro Parks and Nature	\$ 100,000	\$ -	\$ 94,691	\$ 5,309	\$ -	\$ -	\$ -
Oregon Wildlife Foundation Save Sturgeon Lake Campaign	\$ 266,000	\$ -	\$ 236	\$ 192,790	\$ 72,974	\$ -	\$ -
Oregon Wildlife Foundation Help Fund the Bridge Campaign	\$ 225,000	\$ -	\$ -	\$ 225,000	\$ -	\$ -	\$ -
Oregon Department of Fish and Wildlife Fish Passage Grant	\$ 100,000	\$ -	\$ -	\$ 100,000	\$ -	\$ -	\$ -
<b>Total Funds</b>	<b>\$ 1,335,945</b>	<b>\$ 34,793</b>	<b>\$ 94,927</b>	<b>\$ 643,205</b>	<b>\$ 387,151</b>	<b>\$ 116,000</b>	<b>\$ 59,869</b>

Table 2 shows the projected full cost of the Sturgeon Lake Restoration Project. The total cost of the project is expected to be just over \$6.7 million dollars: 19.8% came from the non-federal partners including the \$95,000 of District General Funds approved in the current year and an additional \$100,500 being requested for the FY 2019-20 budget year. Again, remaining expenses for the project for the FY 2019-20 budget year are related to contingency irrigation reconfiguration costs, further due diligence and legal expense associated with securing permanent access for monitoring and maintenance from the Oregon Department of State Lands and continued revegetation of the site.

<b>Table 2: Sturgeon Lake Restoration Project Costs</b>	<b>Total</b>	<b>Prior to 6/30/16 Actuals</b>	<b>FY 2016-17 Actuals</b>	<b>FY 2017-18 Actuals</b>	<b>FY 2018-19 Budgeted</b>	<b>FY 2019-20 Budgeted</b>	<b>Future Ongoing O&amp;M</b>
Phase of Project		Feasibility Study, Detailed Design Report	Project Design & Pre-Project Monitoring, Real Estate Due Diligence	Plans & Specifications, Permits, Construction Easements, Outreach, Begin Vegetation Work, Permits, Outreach	Construction, Engineering On-Site, Cultural Resource On-Site, Permanent Easement Acquisition, Vegetation Management	Contingency for Irrigation Reconfiguration, Final Access Agreements, Vegetation Management	Monitoring, Operations & Maintenance, Adaptive Management
Non-Federal Funding of Cash	\$ 1,335,945	\$ 34,793	\$ 94,927	\$ 643,205	\$ 387,151	\$ 116,000	\$ 59,869
Federal US Army Corps of Engineers Funding	\$ 2,073,580	\$ 1,653,623	\$ 419,957	\$ -	\$ -	\$ -	\$ -
Bonneville Power Administration Funding	\$ 3,330,708	\$ 442,230	\$ 107,478	\$ 175,000	\$ 2,606,000	\$ -	\$ -
<b>Total Project Costs</b>	<b>\$ 6,740,233</b>	<b>\$ 2,130,646</b>	<b>\$ 622,362</b>	<b>\$ 818,205</b>	<b>\$ 2,993,151</b>	<b>\$ 116,000</b>	<b>\$ 59,869</b>

#### Status of the Sturgeon Lake Special Fund

Form LB-10 shows the resources and requirements within the Sturgeon Lake Special Fund. Resources include Working Capital, Investment Earnings, and Grants and Contributions. The FY 2019-20 beginning fund balance for the Sturgeon Lake Special Fund is \$74,019, all of which is in the Stewardship Account. This reflects the

accumulation of investment earnings for all the years the fund has been in place and the \$10,400 of maintenance expenditures for the current year. Additional resources are earnings of \$1,850 from investments and \$100,500 of funds transferred in from the General Fund. Expenditures expected in FY 2019-20 will be \$116,000. Of this amount, \$100,500 will be for contracted services, including \$25,000 for revegetation and \$75,500 for legal fees associated with due diligence related to irrigation reconfiguration costs; the remaining \$16,000 is specific to capital expenses relating to maintenance and monitoring. The resources used for the \$16,000 of maintenance and monitoring will come from the Sturgeon Lake Stewardship Account. The expected unappropriated ending fund balance on June 30, 2020 is \$59,869, all of which represents the funds held in the Sturgeon Lake Stewardship Account.

**Supporting Budget Documents contained in Appendix:**

Budget Calendar

Notice of Budget Hearing (Form LB-1)

General Fund Resources (Form LB-20)

General Fund Requirements (Form LB-30)

Special Fund (Sturgeon Lake) Resources and Requirements (Form LB-10)

Detailed Resources and Expenditures

Financial Policies

Key Performance Measures

Organization Chart

Long Range Business Plan

# Appendix A: Budget Calendar

Item	Notes	Dates
Confirm budget committee members and solicit new public members if necessary	The budget committee is composed of the elected governing board and an equal number of electors appointed by the governing body.	December through 1/25/2019
Post notice of Budget Committee openings on website and other media if openings	There is not a specific requirement to publish/post, but it would be helpful for recruiting public members.	1/7/2019
Prepare Budget Calendar	Calendar posted on website and sent to TSCC	1/16/2019
Appoint Budget Officer by resolution at Board Meeting	Required by ORS 294.331. Controller to serve as Budget Officer.	2/13/2019
Appoint new public members of Budget Committee at Board Meeting	Budget Committee consists of all Board members plus an equal number (7) of public members.	3/13/2019
Publish Notice of Budget Committee Meeting	In accordance with Local Budget Law, the first notice is published in a newspaper (5-30 days prior to meeting date); if second notice will be posted on District website, the newspaper notice must give the website address where the notice will be posted.	3/22/2019
Publish 2 <sup>nd</sup> Notice of Budget Committee Meeting	At least 10 days prior to the meeting. The second notice can be published on our website. It does not need to be published in a newspaper a second time.	3/22/2019
Prepare Proposed Budget and Budget Message	Prepared by Budget Officer. Post on Website and send link to Budget Committee Members.	4/15/2019
<b>Budget Committee Meeting 1</b>	Public Comments taken at this time.	4/17/2019
<b>Budget Committee Meeting 2</b>	Second meeting, if necessary, to approve budget.	4/24/2019
File Approved Budget with TSCC	The sooner of May 15 <sup>th</sup> , or at least 30 days before Budget Hearing; TSCC reviews and prepares Certification Letter.	5/13/2019
Publish Notice of Budget Hearing	To be published in widely-distributed newspaper 5 to 30 days before hearing.	5/22/2019
Budget Hearing	For acceptance of Public Comment on the Budget.	6/12/2019
Enact Resolutions	Adopt budget, make appropriations, impose & categorize tax by June 30. These may be adopted the same day as the Budget Hearing, but it's possible to delay adoption if necessary in order to consider any public testimony given at the Hearing and make appropriate adjustments.	6/12/2019
File Adopted Budget with TSCC	Due within 15 days of adoption. Include response, if applicable, to Certification Letter.	6/27/2019
Submit resolutions and tax certification documents to County Assessor's Office	Copies must be sent to Multnomah, Columbia and Washington Counties by July 15.	7/15/2019
File copies of budget with County Clerk	Copies must be sent to TSCC (in lieu of Multnomah County), Columbia and Washington Counties by September 30.	9/30/2019

# Appendix B: Local Budget Forms

<b>FORM LB-1</b>		<b>NOTICE OF BUDGET HEARING</b>		
<p>A public meeting of the West Multnomah Soil &amp; Water Conservation District will be held on June 12, 2019, at 6:00 p.m. at 2701 NW Vaughn St., Suite 452, Portland, Oregon. The purpose of this meeting is to discuss the budget for the fiscal year beginning July 1, 2019 as approved by the West Multnomah SWCD Budget Committee. A summary of the budget is presented below. A copy of the budget may be inspected or obtained at our office between the hours of 9:00 a.m. and 5:00 p.m. or online at <a href="http://www.wmswcd.org">www.wmswcd.org</a>. This budget is for an annual budget period. This budget was prepared on a basis of accounting that is the same as the preceding year.</p>				
Contact: M.Lewis		Telephone: 503-238-477 Email: <a href="mailto:info@wmswcd.org">info@wmswcd.org</a>		
<b>FINANCIAL SUMMARY - RESOURCES</b>				
<b>TOTAL OF ALL FUNDS</b>	Actual Amount 2017-18	Adopted Budget This Year 2018-19	Approved Budget Next Year 2019-20	ADOPTED Budget Next Year 2019-20
Beginning Fund Balance/Net Working Capital	1,029,973	1,182,048	1,022,316	1,038,817
Federal, State and All Other Grants, Gifts, Allocations and Donations	822,694	301,278	235,303	289,406
Interfund Transfers	-	95,000	100,000	100,500
All Other Resources Except Current Year Property Taxes	36,048	58,469	70,614	70,614
Current Year Property Taxes Estimated to be Received	1,532,969	1,595,000	1,597,000	1,597,000
<b>Total Resources</b>	<b>3,421,684</b>	<b>3,231,795</b>	<b>3,025,233</b>	<b>3,096,336</b>
<b>FINANCIAL SUMMARY - REQUIREMENTS BY OBJECT CLASSIFICATION</b>				
Personnel Services	1,067,209	1,187,610	1,229,450	1,250,250
Materials and Services	1,052,916	1,007,312	806,870	851,545
Capital Outlay	7,200	72,500	18,500	23,628
Interfund Transfers	-	95,000	100,000	100,500
Contingencies	-	10,000	50,000	50,000
Reserved for Future Expenditures	-	25,000	-	0
Unappropriated Ending Fund Balance	1,294,359	834,373	820,413	820,413
<b>Total Requirements</b>	<b>3,421,684</b>	<b>3,231,795</b>	<b>3,025,233</b>	<b>3,096,336</b>
<b>FINANCIAL SUMMARY—REQUIREMENTS AND FULL-TIME EQUIVALENT EMPLOYEES (FTE) BY ORGANIZATIONAL UNIT OR PROGRAM</b>				
<b>Name of Organizational Unit or Program</b>				
<b>FTE for that unit or program</b>				
District Programs	1,716,293	1,880,271	1,938,820	2,008,923
FTE	10.8	10.8	10.8	0.0
Sturgeon Lake Restoration Program	411,032	387,151	116,000	116,500
FTE	0.0	0.0	0.0	0.0
Not Allocated to Organizational Unit or Program	1,294,359	964,373	970,413	970,913
FTE	0.0	0.0	0.0	0.0
<b>Total Requirements</b>	<b>3,421,684</b>	<b>3,231,795</b>	<b>3,025,233</b>	<b>3,096,336</b>
<b>Total FTE</b>	<b>10.8</b>	<b>10.8</b>	<b>10.8</b>	<b>11.3</b>
<b>STATEMENT OF CHANGES IN ACTIVITIES and SOURCES OF FINANCING</b>				
<p>Our resources in FY 2019-20 will decrease \$206,562 primarily due to a decrease in Sturgeon Lake (SL) restoration project grants. As the project finishes up in the fall, remaining funding and associated costs will be minimal. The overall decrease is partially offset by increased resources of \$78,739 in the General Fund. Although property tax revenues are flat, other resources such as state grant funding and beginning fund balances are expected to be higher. Personnel Services requirements increased due to adjustments for projected cost-of-living rates and the Oregon Pay Equity Law. The Materials and Services requirements will decrease by \$200,442, and Capital Outlay by \$54,000, primarily due to SL related activity that will drop off due to the project's completion.</p>				
<b>PROPERTY TAX LEVIES</b>				
	Rate or Amount Imposed	Rate or Amount Imposed	Rate or Amount Approved	
Permanent Rate Levy (rate limit 7.5 cents per \$1,000)	\$ 0.0750	\$ 0.0750	\$ 0.0750	
<b>STATEMENT OF INDEBTEDNESS</b>				
LONG TERM DEBT	Estimated Debt Outstanding on July 1	Estimated Debt Authorized, But Not Incurred on July 1		
<b>Total</b>	None	None		



FORM				RESOURCES					
LB-20				General Fund		West Multnomah SWCD			
				(Fund)					
Historical Data				Estimated This Year 2018-19	RESOURCE DESCRIPTION	Budget for Next Year 2019-20			
Actual		Adopted Budget (updated for Supplemental Budget) This Year 2018-19	Proposed By Budget Officer			Approved By Budget Committee	Adopted By Governing Body		
Second Preceding Year 2016-17	First Preceding Year 2017-18								
				Beginning Fund Balance:					
				1. Available cash on hand* (cash basis) or				1	
941,975	955,296	905,709	1,018,020	2. Net working capital (modified accrual basis)	948,298	948,298	964,798	2	
21,975	19,621	29,562	48,000	3. Previously levied taxes estimated to be received	29,413	29,413	29,414	3	
11,194	18,171	14,000	23,000	4. Interest	24,000	24,000	24,000	4	
				5				5	
				6. OTHER RESOURCES				6	
				7.				7	
1,498	61,421	55,719	55,719	8. Federal Funding	36,147	36,147	36,147	8	
145,922	131,740	147,585	147,585	9. State Funding	176,656	176,656	182,039	9	
52,471	13,033	10,000	10,000	10. Local/Regional Funding	22,500	22,500	52,500	10	
-	5,137	-	-	11. Other Funding	-	-	18,720	11	
				12.				12	
				13.				13	
15,641	16,546	13,050	25,000	14. Reimbursements & Misc	15,350	15,350	15,350	14	
				15				15	
				16				16	
				17				17	
				18				18	
				19				19	
				20				20	
				21				21	
				22				22	
				23				23	
				24				24	
				25				25	
				26				26	
				27				27	
				28				28	
1,190,676	1,220,965	1,175,625	1,327,324	29. Total resources, except taxes to be levied	1,252,363	1,252,363	1,322,967	29	
		1,595,000	1,550,721	30. Taxes estimated to be received	1,597,000	1,597,000	1,597,000	30	
1,436,904	1,513,348			31. Taxes collected in year levied				31	
2,627,580	2,734,313	2,770,625	2,878,045	32. TOTAL RESOURCES	2,849,363	2,849,363	2,919,967	32	
				*Includes Unappropriated Balance Budgeted Last Year					

REQUIREMENTS SUMMARY									
FORM		BY FUND, ORGANIZATIONAL UNIT OR PROGRAM							
LB-30		General Fund					West Multnomah SWCD		
	Historical Data				EXPENDITURE DESCRIPTION	Budget for Next Year 2019-20			
	Actual		Adopted Budget (updated for Supplemental Budget) This Year 2018-19	Estimated This Year 2018-19		Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body	
	Second Preceding Year 2016-17	First Preceding Year 2017-18							
					PERSONNEL SERVICES				
1	954,451	1,067,209	1,187,610	1,166,098	1 Personnel Services	1,229,450	1,229,450	1,250,250	1
2					2				2
3					3				3
4					4				4
5					5				5
6					6				6
7	954,451	1,067,209	1,187,610	1,166,098	7 TOTAL PERSONNEL SERVICES	1,229,450	1,229,450	1,250,250	7
	9.8	10.8	10.8	10.8	Total Full-Time Equivalent (FTE)	10.8	10.8	11.3	
					MATERIALS AND SERVICES				
8	200,535	203,152	253,590	236,149	8 Operations	272,300	272,300	283,650	8
9	494,602	438,732	431,571	416,000	9 Conservation Programs & Services	434,570	434,570	467,395	9
10					10				10
11					11				11
12					12				12
13					13				13
14	695,137	641,884	685,161	652,149	14 TOTAL MATERIALS AND SERVICES	706,870	706,870	751,045	14
					CAPITAL OUTLAY				
15	22,696	7,200	7,500	-	15 Capital Outlay	2,500	2,500	7,628	
16					16				16
17					17				17
18					18				18
19					19				19
20					20				20
21	22,696	7,200	7,500	-	21 TOTAL CAPITAL OUTLAY	2,500	2,500	7,628	21
					Interfund Transfer and Other				
22	-	-	95,000	95,000	22 Transfer Out to Sturgeon Lake Special Fund	100,000	100,000	100,500	22
23					23				23
24			25,000	-	24 Reserved for Future Expenditures				24
25			10,000	-	25 General Operating Contingency	50,000	50,000	50,000	25
26	-	-	130,000	95,000	26 TOTAL TRANSFERS, RESERVES & CONTING.	150,000	150,000	150,500	26
27	1,672,284	1,716,293	2,010,271	1,913,247	27 TOTAL EXPENDITURES	2,088,820	2,088,820	2,159,423	27
28	955,296	1,018,020	760,354	964,798	28 UNAPPROPRIATED ENDING FUND BAL.	760,544	760,544	760,544	28
29	2,627,580	2,734,313	2,770,625	2,878,045	29 TOTAL	2,849,364	2,849,364	2,919,967	29

FORM		SPECIAL FUND						
LB-10		RESOURCES AND REQUIREMENTS			Sturgeon Lake			
		(Fund)			West Multnomah Soil & Water Conservation District			
	Historical Data			Estimated This Year 2018-19	DESCRIPTION RESOURCES AND REQUIREMENTS	Budget for Next Year 2019-20		
	Actual		Adopted Budget (updated for Supplemental Budget) This Year 2018-19			Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
	Second Preceding Year 2016-17	First Preceding Year 2017-18						
					RESOURCES			
					Beginning Fund Balance:			
1					1 Cash on hand * (cash basis), or			1
2	64,081	74,677	276,339	276,339	2 Working Capital* (modified accrual basis)	74,019	74,019	74,019
3					3 Previously levied taxes estimated to be received			3
4	709	1,331	1,857	1,857	4 Earnings from temporary investments	1,850	1,850	1,850
5			95,000	95,000	5 Transferred In from General Fund	100,000	100,000	100,500
6	94,927	611,363	87,974	87,974	6 Project Grants and Contributions	-	-	6
7					7			7
8					8			8
9	159,717	687,371	461,170	461,170	9 Total Resources, except taxes to be levied	175,869	175,869	176,369
10					10 Taxes estimated to be received			10
11					11 Taxes collected in year levied			11
12	159,717	687,371	461,170	461,170	12. TOTAL RESOURCES	175,869	175,869	176,369
					MATERIALS AND SERVICES			
13	85,040	411,032	322,151	322,151	13 Contracted Services	84,000	84,000	84,500
14					14 Contracted Expenditures from Stewardship Acct.	16,000	16,000	16,000
15	85,040	411,032	322,151	322,151	15 TOTAL MATERIALS AND SERVICES	100,000	100,000	100,500
					CAPITAL OUTLAY			
16			65,000	65,000	16 Capital Outlay	16,000	16,000	16,000
17					17			17
18					18			18
19					19			19
20					20			20
21					21			21
22	-	-	65,000	65,000	22 TOTAL CAPITAL OUTLAY	16,000	16,000	16,000
					TRANSFERRED TO OTHER FUNDS			
23	-	-	-	-	23			23
24					24			24
25					25			25
26					26			26
27	-	-	-	-	27 TOTAL TRANSFERS, RESERVES AND CONTINGENC	-	-	-
28	85,040	411,032	387,151	387,151	28 TOTAL EXPENDITURES	116,000	116,000	116,500
29	74,677	276,339	74,019	74,019	29 UNAPPROPRIATED ENDING FUND BALANCE	59,869	59,869	59,869
30	159,717	687,371	461,170	461,170	30 TOTAL REQUIREMENTS	175,869	175,869	176,369
					*Includes Unappropriated Balance budgeted last year			

# Appendix C: Detailed Resources and Requirements

WEST MULTNOMAH SOIL & WATER CONSERVATION DISTRICT DETAILED RESOURCES AND EXPENDITURES	Admin. & Comm.	DEI	Education & OSU Support	Forest Programs	Rural Programs (includes Healthy Streams & Habitats)	Invasive Weeds Programs	Urban Programs	General Fund (LB-20 & 30)	Sturgeon Lake (LB-10)	Adopted Budget FY 2019-20
Working Capital	964,798							964,798	74,019	1,038,817
Previously Levied Taxes estimated to be rec'd	29,414							29,414		29,414
Earnings from temporary investments	24,000							24,000	1,850	25,850
Total Beginning Fund Balance	1,018,211		-	-	-	-	-	1,018,211	75,869	1,094,081
								0		
Federal Funding (NRCS)				21,496	14,651			36,147		36,147
State Funding (ODA, OWEB, OSWB, ODF)	25,162				81,209	34,638	41,030	182,039		182,039
Local/Regional Funding (Metro & CREST)			-		30,000		22,500	52,500		52,500
Other Funding (IGA with 5 SWCD)					18,720			18,720		18,720
Sturgeon Lake Related Grants & Contributions								0		-
Transfer from General Fund to Sturgeon Lake Fund								0	100,500	100,500
Reimb & Misc & Contributions (workshops, cost-share, BES, Parks)	5,250						10,100	15,350		15,350
Total Other Resources	30,412	-	-	21,496	144,580	34,638	73,630	304,756	100,500	405,256
										-
Taxes Estimated to be Received - at assumed tax rate of 7.50%	1,597,000							1,597,000		1,597,000
<b>Total Resources</b>	<b>2,645,623</b>		-	<b>21,496</b>	<b>144,580</b>	<b>34,638</b>	<b>73,630</b>	<b>2,919,967</b>	<b>176,369</b>	<b>3,096,336</b>
<b>Expenditures</b>										
Salaries & Wages	313,988	-	80,233	99,269	175,792	104,368	99,269	872,919		872,919
Insurance: Medical, Life, Vision, Dental	33,609		9,038	19,146	14,330	20,719	13,490	110,332		110,332
Worker's Comp	1,872		147	246	567	346	259	3,437		3,437
PERS	62,578		16,215	16,215	37,061	24,574	17,935	174,579		174,579
Payroll Taxes	32,007	-	8,179	10,119	17,920	10,639	10,119	88,983		88,983
<b>Total Personnel</b>	<b>444,054</b>	-	<b>113,811</b>	<b>144,995</b>	<b>245,670</b>	<b>160,645</b>	<b>141,073</b>	<b>1,250,250</b>	-	<b>1,250,250</b>
Forest Projects				58,661				58,661		58,661
Rural Projects (includes Healthy Streams and Habitats)					83,651			83,651		83,651
Urban Projects							102,580	102,580		102,580
Invasives Projects						71,800		71,800		71,800
Sturgeon Lake								-	100,500	100,500
Education Programs			14,400					14,400		14,400
										-
OSU Ext. (Master Grdnrs) and Metro (IPM website) support			-			7,500		7,500		7,500
Partner Funding			15,242		10,000	9,000	94,561	128,803		128,803
<b>Total Conservation Programs</b>	-	-	29,642	58,661	93,651	88,300	197,141	467,395	100,500	567,895
Events & Supplies	9,000							9,000		9,000
Printing/Production/Signage, Banners, Displays	5,500							5,500		5,500
75th Anniv. Event & Video Production	14,400							14,400		14,400
Cultural History Project	2,700							2,700		2,700
Sponsorship of Community Events	7,500							7,500		7,500
Graphic Designer	2,500							2,500		2,500
Media, Advertising, Marketing	500							500		500
Postage and Delivery	2,000							2,000		2,000
LRBP Consultant and use of Community Engagement Liasons	30,000							30,000		30,000
Audience Research Project	6,500							6,500		6,500
DEI - outreach / material in other languages, event speakers	2,500							2,500		2,500
Website (total Design and videos)	1,500							1,500		1,500
Total Communication & Outreach Expenses	84,600			-	-	-	-	84,600		84,600

WEST MULTNOMAH SOIL & WATER CONSERVATION DISTRICT DETAILED RESOURCES AND EXPENDITURES	Admin. & Comm.	DEI	Education & OSU Support	Forest Programs	Rural Programs (includes Healthy Streams & Habitats)	Invasive Weeds Programs	Urban Programs	General Fund (LB-20 & 30)	Sturgeon Lake (LB-10)	Adopted Budget FY 2019-20
Rent (includes office space, storage facilities, employee parking)	76,400							76,400		76,400
Computers/Maintenance (monthly support and add-ons)	19,100							19,100		19,100
District Vehicle - Gas/Maintenance/Fees/Parking	13,000							13,000		13,000
Telephone (include landline & staff cell reimb)	12,000							12,000		12,000
Membership & Profess. Organizational Dues	7,288							7,288		7,288
Insurance (genral liab., auto, property, crime)	9,548							9,548		9,548
Office supplies (includes field supplies used across programs)	8,240							8,240		8,240
Audit	4,800							4,800		4,800
Refreshments for office & Internal (Staff & Board) Meeting Snacks	3,084							3,084		3,084
Furniture / Office Equipment	7,000							7,000		7,000
Professional Contracted Non-Employee Services	2,040	6,000						8,040		8,040
Program related meeting meals & snacks for conserv. programs	1,500							1,500		1,500
Payroll Service Fee	2,300							2,300		2,300
TriMet option incentive for staff	1,800							1,800		1,800
Biking & walking incentive option for staff	0							-		-
Program related mileage and parking	2,400							2,400		2,400
Legal Notices	2,300							2,300		2,300
Field Supplies - non-program specific	1,100							1,100		1,100
Licensing/Fees	1,200							1,200		1,200
Bank & LGIP Fees	300							300		300
Recruiting	400							400		400
Total Admin Operating Expenses	175,800	6,000	-	-	-	-	-	181,800	-	181,800
Travel & Food (per diem) for workshops / training	4,250							4,250		4,250
Board Development	2,000							2,000		2,000
Staff Development (includes tuition for approved programs)	6,000	5,000						11,000		11,000
Total Board/Staff Training Expenses	12,250	5,000	-	-	-	-	-	17,250	-	17,250
										192,550
Total Operations Expenses	272,650	11,000	-	-	-	-	-	283,650	-	283,650
Total Materials and Services Expenses	272,650	11,000	29,642	58,661	93,651	88,300	197,141	751,045	100,500	851,545
								-		-
Misc. Capital Purchases	7,628							7,628	16,000	23,628
Total Capital Outlay	7,628							7,628	16,000	23,628
Inter-fund Transfer Out	100,500							100,500		100,500
General Operating Contingency	50,000							50,000		50,000
Reserve for Future Expenses or Economic Stabilization Reserve								-		-
Total Transfers and Contingencies	150,500	-	-	-	-	-	-	150,500	-	150,500
Total Expenditures	874,833	11,000	143,453	203,656	339,321	248,945	338,214	2,159,423	116,500	2,275,923
Unappropriated Ending Fund Balance Required								760,544	59,869	820,413
Total Requirements								2,919,967	176,369	3,096,336
Total Appropriated (includes Contingency)								2,159,423	116,500	2,275,923
Total Unappropriated								760,544	59,869	820,413

# Appendix D: Financial Policies

The District's financial policies, summarized below, set forth the basic framework for the overall fiscal management of the District. Operating independently of changing circumstances and conditions, these policies assist the decision-making process of the Board of Directors and the District leadership team. These policies provide guidelines for evaluation of both current activities and proposals for future expenditures. Policies are reviewed annually and revised as necessary. These policies are the basis of the District's Standard Operating and Accounting Procedures and are intended to be consistent with the best practices recommended by the Government Finance Officers Association. Most of the policies represent long-standing principles and practices which have guided the District in the past and have helped maintain financial stability since 2006, when the District voters approved a tax base.

## ***Budget and Financial Planning***

- The Board of Directors will review the District's long range business plan and the associated annual work plans, upon which the budget is based, annually. At the Board's regularly scheduled monthly board meetings, the Board Treasurer (or designee) will review the financial statements and any variances from budget with the full board.
- The Board will establish funding priorities to reflect the District's mission to conserve and protect soil and water resources for people, wildlife, and the environment.
- The District will be a good steward of public funds and ensure that budgeting and financial management are in compliance with applicable laws and regulations, and achieve results that are in the best interest of the District, its taxpayers and grantors.
- The budgeting and financial reporting process will be conducted in a manner that is transparent and easy for taxpayers to understand.
- The budgeting process has a direct and strong connection with the long-range business plan adopted by the Board of Directors.
- The District will avoid budget decisions or procedures that provide for current operational expenditures at the expense of future needs.
- The District will build and maintain a reserve for future expenditures that will be used to fund larger scale opportunities (such as acquisitions or easements) consistent with the goals and priorities in the District's long range business plan and to provide resources for budgeting when property tax revenues are dampened by poor economic conditions.
- The District will maintain a balanced budget, defined as when a fund's total resources (comprised of beginning fund balance, revenues, and other resources) are equal to the sum of a fund's total expenditures, reserve for future expenditures and ending fund balance.

## ***Finance and Accounting***

- Financial and accounting duties and responsibilities will be separated for internal control purposes to the greatest extent possible so that no one staff member can control all phases of collecting cash, recording cash, processing transactions and reconciling accounts in a way that permits errors or omissions to go undetected.

- Access to computer or online systems for accounting, personnel, payroll, and banking is controlled by password access. Permissions within each system are set to allow appropriate level of access depending on role and responsibility.
- Financial and accounting policies will be reviewed annually by the Board Treasurer and the Controller.

### ***Use of District Resources***

- It is the policy of District to be a good steward of public funds. To that end, expenditures must be for a valid public purpose which benefits the community, is directly related to the District's authorized functions, and which does not have as its primary objective the benefit of a private person.
- The District will follow the procurement statutory requirements of Oregon Revised Statutes (ORS chapters 279A, B and C) and Oregon Administrative Rules (OAR Chapter 137, division 46, 47, 48, and 49) and other relevant state laws and regulations as applicable to governmental entities.
- In addition, it is the policy of the District to maintain appropriate internal fiscal controls to promote effective and efficient use of resources; to safeguard resources against loss due to waste, mismanagement, abuse, or fraud; and to ensure compliance with applicable state and federal laws, regulations, and fiscal best practices.

### ***Revenue and Cash Management***

- The District's primary source of revenue is a permanent property tax levy; however, the District will work to develop diversification of revenue to include, but not be limited to, federal, state and local grants, intergovernmental revenue, contributions and charges for services.
- The District will fund current expenditures with current revenues, avoiding the use of one-time funds and unpredictable revenues for ongoing expenses, postponing needed expenditures, or depleting reserves to meet current expenses.
- The District will maintain an ending fund balance of at least four months of budgeted expenditures to provide sufficient funds for operations prior to receipt of the subsequent year's tax revenue and also of amounts set aside for the District's reserve for future long-range expenditures.
- The District will maintain an adequate and prudent contingency fund within the general fund. The contingency fund will be used for unanticipated or exceptional unbudgeted expenditures only with the approval of the Board of Directors.
- The District will maintain a Sturgeon Lake Stewardship fund within the Sturgeon Lake fund to be used for the monitoring and maintenance of the Sturgeon Lake Restoration Project; upon completion of the planned maintenance work, unused funds will be used for other improvements to the Sturgeon Lake Restoration Project, upon consensus of Project partners.
- The District will actively seek grant funding for both operating and capital expenditures, provided that the grant is consistent with the District's mission and goals, provides a benefit that exceeds cost, and does not commit the District to long-term tax funded expenditures following the completion of the grant period.

### ***Investment***

- It is the policy of the District to invest public funds in a manner which will provide maximum security with the highest investment return while meeting the cash flow demands of the District and conforming to all state and local statutes governing the investment of public funds.

### ***Asset Management***

- It is the policy of the District to maintain accountability for its assets. The District will maintain asset records and verify those records by a physical inventory at least annually.

- The District will maintain its physical assets at a level that is adequate to protect its capital investment and to minimize future maintenance and replacement cost. The District budget will provide for adequate maintenance and orderly replacement of its assets.
- In addition, it is the policy of the District that the disposal of surplus property is accomplished through an efficient and appropriate process that is in compliance with applicable laws and regulations, and that achieves results that are in the best interest of the District and its taxpayers.

### ***Debt***

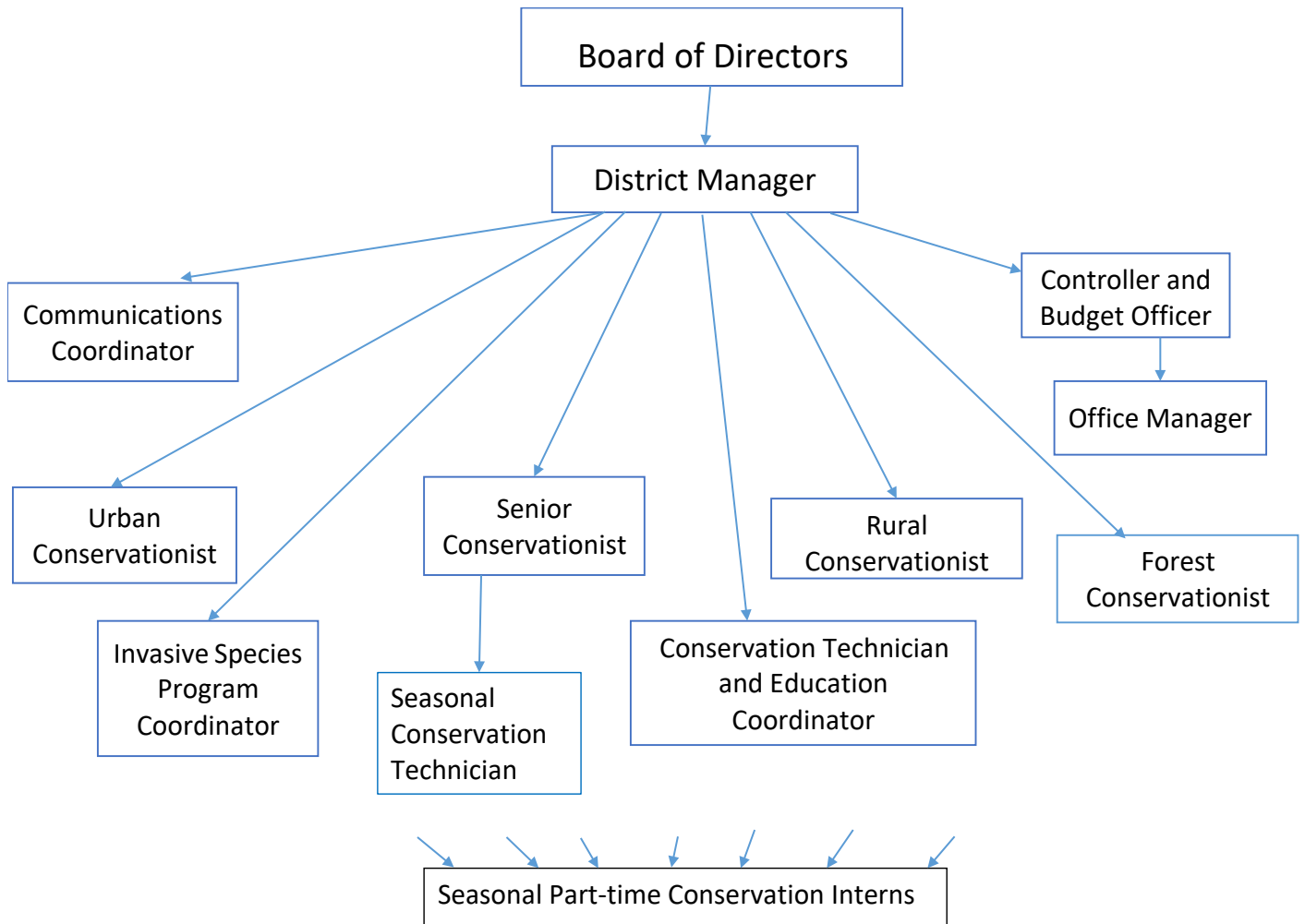
- It is the policy of the District to consider community needs, the District's current and projected long-term fiscal position and overall cost to the District's taxpayers in determining if debt should be issued by the District.



# Appendix E: Key Performance Measures

Metrics	FISCAL YEAR TOTAL					Goals					
	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020 Goals	Water Quality	Healthy Soil	Habitat & Ecosystem	Working Lands	Land Stewards	Vibrant Agency
Conservation Plans Completed	34	39	32	27	28	✓	✓	✓	✓		
Landowners Served	649	825	824	546	562	✓	✓	✓	✓	✓	✓
Acres Treated for Invasive Plants	237	129	46	47	48	✓	✓	✓			
Acres of Native Habitat Enhanced	281	251	257	236	243	✓	✓	✓	✓		
Native Plants Installed	150,004	55,623	30,985	69,926	72,024	✓	✓	✓	✓		
Linear Feet of Streams/Banks Enhanced	28,261	46,090	36,254	30,826	31,751	✓	✓	✓			
People Served at Outreach Events	3,585	1,237	2,550	3,370	3,471					✓	✓
Acres of Cropland Improved through Soil Health Practices	-	38	25	47	48		✓		✓		
Public Meetings Held (Board Meetings, DEI Meetings, Annual Meeting)	15	17	17	17	18						✓
Recognition Awards Given	7	5	4	8	8						✓
Partners Engaged	44	44	59	67	69						✓
Partner Support and Spending to Leverage Conservation Efforts	\$ 100,300	\$ 103,230	\$ 107,725	\$ 135,145	\$ 135,146	✓	✓	✓	✓	✓	✓

# Appendix F: Organization Chart



# **Appendix G: Long-Range Business Plan**

# West Multnomah Soil & Water Conservation District

Long-Range Business Plan

2015-2019



Conserve and protect soil and water resources for people, wildlife  
and the environment.

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**West Multnomah SWCD Office**

2701 NW Vaughn Street, Suite 450  
Portland, Oregon 97210  
Phone: 503-238-4775  
Fax: 503-326-3942  
Email: [info@wmswcd.org](mailto:info@wmswcd.org)  
Website: [www.wmswcd.org](http://www.wmswcd.org)

**Board of Directors**

Terri Preeg Riggsby, Chair  
Shawn Looney, Vice Chair  
Brian Lightcap, Secretary  
Weston Miller, Treasurer  
Jane Hartline  
Kim Peterson  
George Sowder

**Associate Directors**

Finlay Anderson  
Jan Hamer  
Susan Weedall  
Bob Wiley, Sr.

**Monthly Meetings**

Board Meetings are held the second Wednesday of the month at the District Office, at 6:00 PM. The public is invited.

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## EXECUTIVE SUMMARY

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This Business Plan (2015-2019) details the West Multnomah Soil & Water Conservation District (the “District”) services, activities, resources, staffing, and finances currently available and planned to carry out the District’s mission. The Business Plan also contains general information about the District and Multnomah County and guides the development of the District’s annual work plans and budget.

The District serves residents within its boundaries (the portion of Multnomah County west of the Willamette River, all of Sauvie Island, and the Bonny Slope area of the Tualatin Mountains in Washington County) with information and assistance on conservation planning, invasive weeds, native plants, livestock management, grant funding, wildlife, healthy woods, habitat restoration, school gardens, stormwater management and other conservation projects. How will the District look if our staff, board, and volunteers do their work well?

- More urban and rural landowners will know about invasive plant species and be diligent about controlling them on their property.
- Horses, cows, goats and llamas will enjoy lush pastures without polluting our streams and rivers.
- Our streams, rivers and watersheds will be healthier, supporting the return of endangered salmon species.
- Birds and bees will thrive with ample food and shelter and will co-exist with people on farms and in suburban backyards.
- Rare habitats, such as oak savannas, ash swales and sedge meadows, will be appreciated and restored.
- Private landowners will be thoughtful and knowledgeable stewards of their forests and small wood lots.
- District residents will enthusiastically tackle conservation initiatives like rain gardens, bioswales, hedgerows, and other native planting projects.
- District residents will enjoy more locally-grown food, farmed with methods that contribute to the long-term health of the land.

### *Public Participation*

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This Plan was prepared with input from staff, board members, community members and partners. As part of the process we identified visions for the future, current and potential clients, geographic attributes, landowner needs, partner agencies and non-profit organizations, and strategies to achieve our goals and objectives while ensuring socially equitable access to our services by all citizens.

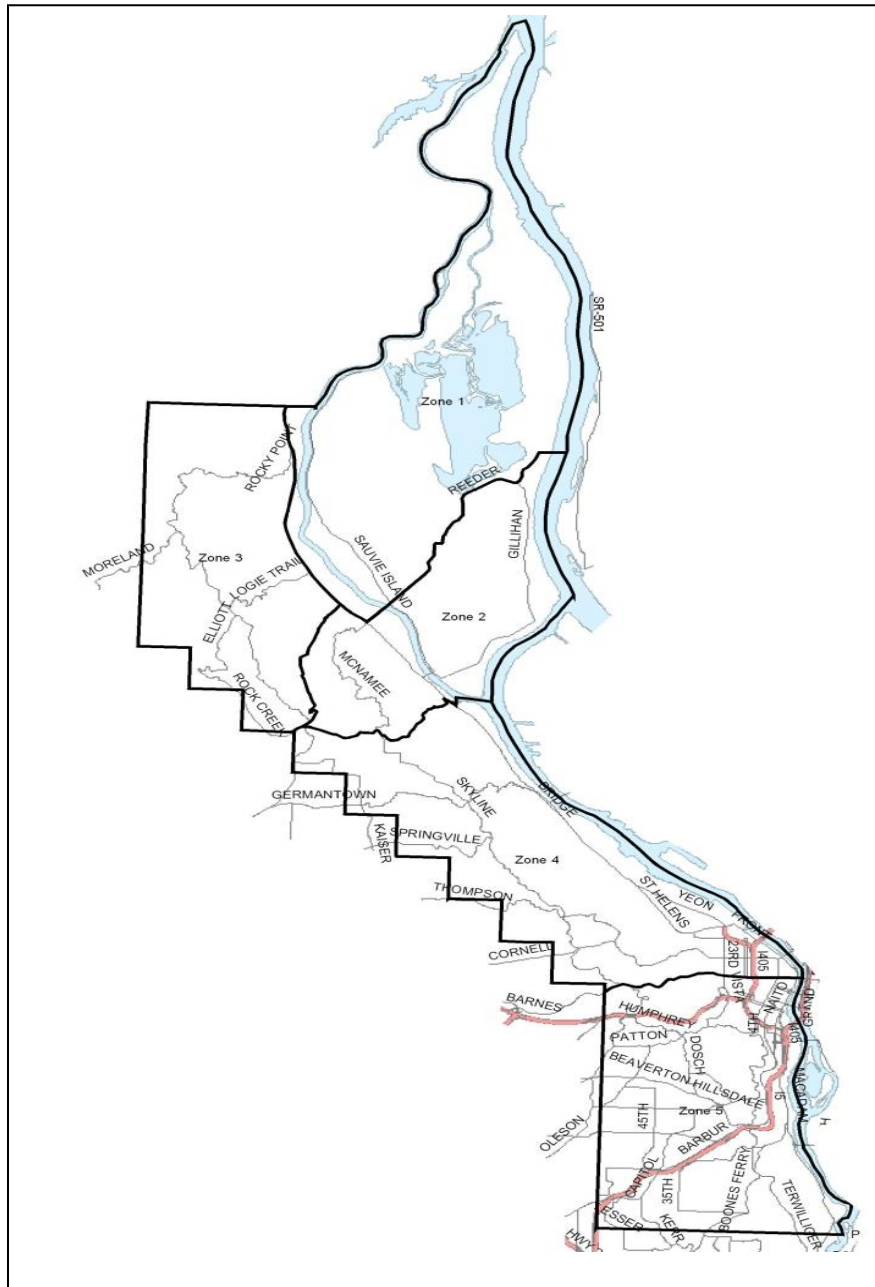
### *Audience*

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This Plan is intended for District’s residents, Multnomah County officials, funding sources, legislators, and partner agencies. It will be a useful document for District landowners, partners, stakeholders, and others who seek to understand the District’s work. It will also be a living document to guide District staff and board in their day-to-day operations and to help ensure that policies, programs, services and decisions are beneficial to the District.

## GEOGRAPHY AND AGRICULTURE

The District's service area includes the portion of Multnomah County west of the Willamette River and all of Sauvie Island. It is divided into five zones and represents a highly diverse area of urban and rural dwellings, forest and farm land, and owners of small and large properties.



**Zone 1:** The East limit is the middle of the Columbia and Willamette Rivers. South limit is the middle of the Multnomah Channel. West limit is south of the Gillihan/Reeder Road intersection-property lines on East side of Reeder Road. North of Gillihan/Reeder Road intersection-property lines on west side of Reeder Road (Includes Columbia County tip).

**Zone 2:** North limit is Multnomah/Columbia county line. West limit is middle of Multnomah Channel. East & South is Zone 1.

**Zone 3:** North and West limit is Multnomah County line. East limit is center of the Multnomah Channel. South limit is property lines on south side of Cornelius Pass Road.

**Zone 4:** North limit is Zone 3. East limit is center of Multnomah Channel & Willamette River. South limit is line of county sections 22-24 and 19 to the middle of Willamette River. West limit is Multnomah County line.

**Zone 5:** North limit is Zone 4. East limit is center of Willamette River. South & West limits are Multnomah County line.



## *Topography*

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Our service area contains approximately 86,260 acres, of which 17,097 are non-industrial private forestland and 3,691 are industrial forestland. Public forestland includes 1,035 acres of Federal land, 2,181 acres owned by Metro, 89 acres owned by the State of Oregon and 21 acres owned by Multnomah County. According to the U.S. Census Bureau, the county has a total area of 466 square miles (1,206 km<sup>2</sup>), of which 435 square miles (1,127 km<sup>2</sup>) are land and 79 km<sup>2</sup> (30 sq. mi or 6.53%) are water.

## *Land Use*

---

Our District is a diverse landscape of urban and rural uses. The urban area includes downtown Portland, made up of businesses properties, private apartments and condominiums, small and large public parks, a large university system, public transit including light rail and street cars, tourist attractions and outdoor gathering places. Outside of downtown Portland, the urban area is comprised of residential neighborhoods with diverse housing options interspersed by substantial natural areas.

The rural area includes small and large agricultural operations, from small, organic farms to hobby farms, including stables, livestock operations, kennels, private land, public natural areas, organic and non-organic food production, and creeks and streams.

About 20 percent of the county is classified as commercial forestland; of this, about 30 percent is publicly owned.

## **STRUCTURE AND GOVERNANCE**

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### *Enabling and Governing Legislation*

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The Soil Conservation Service was authorized by Federal Legislation in 1937. The District is one of 45 conservation districts in Oregon, which are defined in Oregon law as political subdivisions of state government. The District is not a state agency. Rather it is classified as a municipal corporation, a form of local government, which is required to follow many of the same laws that govern state agencies and special districts. It is specifically governed by ORS 568.210 to 568.890 and ORS 568.900 to 568.933. See Appendix A for the specific powers and authorities granted to districts. Appendix B lists other statutes and administrative rules to which the District is subject.

The Oregon Revised Statutes (ORS) that established and govern Oregon's SWCDs (except the federal tribal Tiicham Conservation District) were significantly revised by the 2009 Legislative Assembly under House Bill 2082. The origin of the House Bill was a collaborative effort among the Oregon Association of Conservation Districts, member Conservation Districts, and the Oregon Department of Agriculture. It was designed to address the evolving challenges and opportunities presented to today's SWCDs that were not envisioned when the statute originated, and to eliminate antiquated provisions in the previous editions.

In addition to the general purpose of SWCDs under ORS 568.225 in the previous editions, the following was added: **“promote collaborative conservation efforts to protect and enhance healthy watershed functions, assist in the development of renewable energy and energy efficiency resources.”**

## *History*

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The District was established in 1944 to direct agricultural producers to technical assistance resources, such as our partners the Natural Resource Conservation Service (NRCS). In recent years, NRCS and the District have successfully partnered to plan and implement conservation practices on private lands in the basin.

The District was organized as the Sauvie Island Soil Conservation District. The District expanded to its current size in April 1975 and changed to its existing name. District voters approved a tax base in November 2006, ensuring a stable revenue source for programs delivered to west side citizens beginning in fiscal year 2007-2008.

## *Leadership*

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### **Directors**

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A board of seven directors governs the District. Directors are elected by voters in the District’s service area at the November General Election, held during even-numbered years. Director positions are elected in staggered terms to provide continuity on the board and maintain consistent operations. The District Board may appoint a person to fill a board vacancy between elections for the duration of that position’s term. Five of the seven positions are classified as zone positions and must meet the zone requirements and terms of office as specified in ORS 568.560 as follows: “Zone directors must own or manage 10 or more acres of land in the district, be involved in the active management of that property, reside within the boundaries of the district, and be a registered voter.”

An individual may serve as a zone director in lieu of land ownership or management requirements if the individual resides within the zone that is represented, has served at least one year as a District Director or Associate Director and has a conservation plan approved by the District Board. The other two positions are at-large. To qualify for an at-large position, a person must reside in the District’s service area and be a registered voter. No land ownership or management requirements are needed for an at-large position, which is also governed by ORS 568.560.

An individual director has power only when acting as a part of the District Board. Individual board members may be delegated authority or power to act on behalf of the Board in specific, limited tasks. This authority or power is granted through board action (resolution, motion, policy, etc.) and must be recorded in the meeting minutes.

The District Board works cooperatively as a unit to plan and oversee implementing District programs. As a representative of the District Board, opinions expressed publicly by individual board members should be consistent with established board policy, not the individual’s personal agenda or opinions.

ORS 568.560 requires all SWCDs to select a Chair and Secretary from among its directors. The District may elect other officers as desired.

The **Chair** is granted the responsibility to represent the District with other districts, agencies, associations, partners, organizations, legislators, and property owners consistent with the policies, plans, and interests of the District. The Chair will also conduct regular and special meetings of the Board.

The **Vice-Chair** is given authority to act as the Chair in case of the absence or unavailability of the Chair.

The **Secretary** is the custodian of all the District records, minutes, contracts, and other official documents.

The **Treasurer** reviews the District's monthly receipts and expenditures and presents the financial statements and associated updates to the Directors at District board meetings.

**Committees** can be an effective way for the District to plan and implement the District's functions as well as bring in points of view from our District that might otherwise be underrepresented by our elected board of directors. This helps ensure our policies, programs, services and decisions result in socially equitable outcomes for all citizens of our District. Committees can be comprised of board members, associate directors, District advisors, representatives of cooperating agencies and associations, or interested citizens. Committees can be ad hoc or standing. Currently the District has a standing Personnel committee and has on occasion formed ad hoc committees (e.g. Nominating committee). Ad hoc committees are charged with specific tasks over a specific time period and are then disbanded after the assigned task and/or timeframe is completed.

## Associate Directors

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Associate Directors are non-voting members of the District Board. They are appointed by the Directors to serve as advisors and representatives. Associate directorship offers a way to educate potential directors, broaden community input to the District, and expand District programs.

## MISSION, VALUES, AND GUIDING PRINCIPLES

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### *Mission*

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Conserve and protect soil and water resources for people, wildlife, and the environment.

### *Vision*

---

The District is committed to working with its constituents to meet the demand for natural resource education and technical assistance to urban and rural residents, farmers, business owners, public schools and the general public and to increase the economic viability and environmental health of the rural and urban regions.

## *Guiding Principles and Values*

---

### **Guiding Principles**

1. We provide assistance to the public and respond to requests in a timely and courteous way. If we cannot provide direct assistance we strive to find other resources that meet landowners' needs.
2. We form strategic partnerships to maximize our work and minimize duplication with other agencies.
3. We focus our efforts on underserved populations and geographic areas.
4. To maximize our limited resources and impact, our urban focus is on leveraging landowner partnerships to spread participation through targeted watershed areas.
5. As an organization, we conserve natural resources (e.g. Reduce, Reuse & Recycle, Energy Conservation, etc.).
6. We address conservation problems methodically; we identify and analyze resource concerns before we determine solutions, as called for by sound conservation science and planning principles.
7. We complete project planning and assess viability according to our Goals & Strategies before seeking funding.
8. We urge voluntary commitments to conservation; we are not a regulatory body and do not enforce compliance. We maintain political neutrality and respect the privacy of all landowners.
9. We work as members of a flexible, respectful and responsive team.
10. We maintain a vibrant, culturally agile and cooperative board that helps outreach to and engage fellow landowners/partners.
11. We value and reward staff for hard work and innovation and provide staff/board development and training to maintain skills and science-based knowledge to better serve our constituents, maximize our credibility, and increase the success of on-the-ground conservation.
12. We incorporate equity and inclusion awareness and practice into our work process and programs.
13. We act with integrity and operate with transparency.

### **Guiding Values**

1. Clean water is vital to people and wildlife.
2. Good soil is a life-sustaining, non-replaceable resource.
3. Healthy ecosystems are essential to humans and native wildlife.
4. Humans have a responsibility to, and self-interest in, being good stewards of the natural world.
5. A steady supply of locally-produced food is important to the quality of life, sustainability and economy of our District.
6. Well-managed agricultural and forest operations can co-exist with wildlife.
7. Informed and engaged board, staff and landowners are key to the success of our mission.
8. Our community conserves natural resources most effectively when all stakeholders are engaged and welcomed.
9. The strength and vibrancy of our District rests on its diversity.

## *Equity & Diversity*

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### **District Non-Discrimination Policy**

The District prohibits discrimination on the basis of race, color, sex, national origin, age, disability, gender, marital status, religion, sexual orientation, genetic information and political beliefs. The District is an equal opportunity employer.

### **Racial Equity Policy**

In 2015, staff and board members completed a Racial Equity Assessment through a program organized by the Intertwine. By initially focusing on racial equity, we can address Portland's most glaring inequities while developing policies and practices that result in more accessible programs and services for all. Upon completion of the training, the District developed a defined Racial Equity Policy with strategies to implement it.

#### **Why the District Needs a Racial Equity Policy:**

1. Environmental health impacts all and engaging and welcoming all stakeholders is crucial to ensuring this success.
2. The District's staff and board have a low level of racial diversity.
3. Having diverse perspectives engaged in organizational decisions would increase our District's overall strength and relevance.
4. District programs fail to engage many racially diverse audiences (no demographics data is currently collected to support this, but this has been determined by a staff survey).
5. The District lacks partner and grant requirements to demonstrate or encourage equity.
6. The District will be better able to identify and address community priorities if it partners with underserved communities of color, and works with them to ensure messages and programs are meaningful and accessible to them.
7. Demographic data (Curry-Stevens, A., Cross-Hemmer, A., & Coalition of Communities of Color (2010). *Communities of Color in Multnomah County: An Unsettling Profile*. Portland, OR: Portland State University) predicts that in several decades Caucasians will not be the majority in NW Oregon. Organizations that do not make the effort to better include and serve people of color will be unable to successfully engage more than half of their future constituents.

#### **Our Racial Equity Policy includes the following:**

1. A vision statement that highlights the aim to welcome, engage and provide open access to people of color in all facets of our organization.
2. District Non-Discrimination Policy (see above)
3. Intended outcomes
4. A plan for resource allocation
5. The role partnerships will play in addressing equity
6. Offer concrete next steps and accountability mechanisms
7. Action items in staff members work plans that address equity through District programming

## **ROLES AND RESPONSIBILITIES**

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The District works with agencies and individuals as partners in efforts to achieve our vision. Various memorandums of agreement and/or understanding, working agreements, intergovernmental agreements and informal arrangements, formalize the partnerships. The agreements outline the responsibilities of

each partner and identify the types of assistance, resources, and support each will provide to accomplish common conservation goals.

The District believes that our existing partners, which currently include non-profits, government organizations, private companies, landowners and volunteers, and yet-to-be determined partners are crucial to us reaching our equity goals. Our work will only be successful if we are able to truly partner with the community, engage with respect, authentically listen – and have the commitment to share decision making, control and resources. We must further examine and prioritize working with partners that share our equity goals to further maximize impacts with underserved communities.

### *Local Level*

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#### Landowners, Producers, General Public

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The general public uses the District as its primary point of contact for not only District programs but those of the Oregon Department of Agriculture and the USDA's Natural Resource Conservation Service. Landowners and agricultural producers can avail themselves of technical assistance with natural resource concerns and assistance in securing grant or loan funding for an array of natural resource conservation projects.

#### West Multnomah Soil & Water Conservation District

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The District assists the general public with conservation planning, technical and financial assistance, Federal farm bill program opportunities, and answers to conservation-related questions.

The District provides residents of its service area with information on and assistance with conservation planning, invasive weeds, native plants, pasture and livestock, soil health, soil erosion, funding assistance, wildlife, healthy woods, habitat restoration, stormwater management, water-quality protection, school gardens and other conservation-related projects.

#### OSU Extension Service

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The District maintains a working relationship with the Multnomah County office of Oregon State University Extension Service. The District welcomed the Oregon State University Extension Master Gardeners into our office in 2009, giving the hotline and 600 Master Gardener volunteers a presence in the county it had been lacking after falling victim to county budget cuts.

#### County Government

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The District works with a diverse group of key partners in local government agencies: City of Portland (Parks, BES, and Planning & Sustainability), Metro, Multnomah County, Clackamas County and Washington County.

#### Other Local Partnerships

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The District partners with many other local groups that help us achieve our mission: Linnton Neighborhood Association, Skyline Ridge Neighbors, Scappoose Bay Watershed Council, Backyard Habitat Certification Program, Tryon Creek Watershed Council, West Willamette Restoration Partnership, Forest Park Conservancy, SW Watershed Resources Center and Depave. The District also works with the Sturgeon Lake Work Group including the Bonneville Power Administration, Ducks Unlimited, Oregon Dept. of Fish and Wildlife (ODFW), the Dept. of State Lands and scores of groups to fund the Save Sturgeon Lake restoration project. Specific groups on Sauvie Island (SI) that we work with regularly include: SI Community Association, SI Drainage Improvement Company and SI Grange. The District works closely with neighboring SWCDs, including Tualatin, Columbia, Clackamas and East Multnomah.

## Regional Level

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The District works with the following partners across most or all of the geographic areas in which we focus our efforts:

Four County Cooperative Weed Management Area, Department of Environmental Quality, Metro, Intertwine Alliance, Multnomah County, Northwest Weed Management Partnership, Oregon Department of Agriculture, Oregon Department of Forestry, Oregon Department of Transportation, Oregon Invasive Species Council, Oregon State University Extension Services, SOLVE, and others.

## USDA Natural Resource Conservation Service (NRCS)

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The District maintains a Cooperative Working Agreement with the NRCS to provide assistance with conservation planning and the implementation of conservation practices in its service area. From time to time, the District also enters into Contribution Agreements with NRCS to produce complete conservation plans. The NRCS provides technical assistance to the District and directly to county landowners and producers. The District is served through NRCS offices in the Portland Metro area.

## Local Advisory Committee

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Local Advisory Committees (LAC) are made up of landowners, agricultural producers, and an environmental representative whose charge is to develop an Agricultural Water Quality Management Area Plan. District staff participate in three local advisory committees: North Coast LAC, Lower Willamette LAC, and Tualatin LAC.

Additionally, staff and board members have been involved in Citizen Advisory and Technical Advisory Committees that are working on issues of importance to citizens in our service area (issues such as the Sauvie Island Multnomah Channel land use / transportation policy review and Portland Harbor Superfund studies and implementation).

## State Level

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### Oregon Department of Agriculture (ODA)

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The Oregon Department of Agriculture Natural Resources Division provides administrative oversight and partial administrative and technical support funding.

### OWEB, DEQ, and other State Agencies

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The Oregon Watershed Enhancement Board (OWEB), the Department of Environmental Quality (DEQ), Oregon Department of Fish and Wildlife (ODFW), and Department of State Lands (responsible for navigable waters, submerged and submersible land plus leases for marinas, and moorages) provide funding.

### Oregon Association of Conservation Districts

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The OACD provides technical and administrative support to the District and is the main conservation district advocacy organization with the Oregon State administration and legislature.

### National Level

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#### USDA NRCS

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The national NRCS office provides funding of work agreements with the District.

### Revenue to the County Economy

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Landowners and community partners who work with the District on restoration and conservation projects are making a wise investment. Growing evidence indicates that land conservation and restoration projects produce significant economic benefits and result in increased property values. Communities with healthy lands and clean water are perceived as nicer places to live, attracting businesses and people, including non-resident visitors who put new dollars into local economies. Healthy soil captures precipitation, reduces stormwater management costs and, by protecting underground water sources, can reduce the cost of drinking water up to tenfold. In addition, District-funded projects and partnerships provide business to local private companies, spur new companies to form and increase employment opportunities for local non-profits.

The District has funded research studies with local experts and consultants regarding hydrology of the Sauvie Island drainage canals, ditches and remnant Gilbert River. The District also serves as local sponsor and founding partner with the US Army Corps of Engineers for a \$7 million restoration project to save Sturgeon Lake on Sauvie Island.

Our contracts with local restoration providers fund work for hundreds of employees (part-time) and nearby suppliers of tree starts, understory native plants and related materials.



## GOALS

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The District's goals are to:

- 1: Improve water quality in our watersheds
- 2: Minimize erosion and build healthy soils
- 3: Enhance habitats, biodiversity and ecosystem function
- 4: Enhance the productivity and sustainability of working lands
- 5: Cultivate land stewards of all ages
- 6: Ensure that the District is a vibrant agency

These broad strategic goals help focus our efforts to ensure that we are working toward the same end. Each program described in District Programs below helps achieve one or more of the above broad goals. Additionally, staff develop work plans on an annual basis which are a comprehensive list of the strategies, objectives and metrics by which we strive to achieve our goals and measure progress. See the current year's annual work plans and our metrics table showing how we annually measure our progress against our goals in Appendix E.

## DISTRICT PROGRAMS

The District strives to obtain equity on all programs. We seek to understand the conservation needs and desires of diverse communities within our District. Just as ecosystems are more resilient when they are diverse, the strength and viability of our District rests on its diversity. We invest in relationships and seek to support and add value to the work of a wide range of organizations and communities when our priorities align. We support and include different approaches to and ways of addressing the issues our communities face, and respect the wisdom and values of the people who live here.

Board and management are committed to and work towards ensuring that organizational infrastructure, leadership, and staff represent regional demographics. We incorporate equity and inclusion awareness and practices in all work processes and programs. We work with and learn from partner organizations that have developed tools and practices for cultural awareness and inclusion and adapt them to District work. We continue to learn and improve our processes over time. We have developed a system-wide approach to integrate equity, diversity and inclusion.

All of our District's programs are designed to help us achieve our broad strategic goals. The following table summarizes which programs support each goal. The bolded uppercase "X" shows the main focus of the program, and the non-bolded lowercase "x" indicates supplemental goals addressed.

Programs	Goals					
	Water Quality	Healthy Soil	Habitat & Ecosystem	Working Lands	Land Stewards	Vibrant Agency
Conservation Planning	x	x	x	x	x	x
Healthy Streams	<b>X</b>	x	x		x	x
Neighborhood Demonstration Projects	x	x	x		<b>X</b>	x
EDRR (Early Detection and Rapid Response)	x	x	<b>X</b>	x	x	x
Partner Funding Program	x	x	x	x	x	x
Sturgeon Lake	x		<b>X</b>			x
Outreach & Education Programs	x	x	x	x	<b>X</b>	x
Stormwater Programs	<b>X</b>	x	x	x	x	x
Priority Habitat Restoration	x	x	<b>X</b>	x	x	x

Working Lands (agriculture and forestry)	x	x	x	<b>X</b>	x	x
Soil Health	x	<b>X</b>	x	x	x	x

### 1. Conservation Planning

Conservation professionals work with landowners to develop individual plans that identify practices and management behavior to best protect soil and water quality, enhance plant and animal health, and financially benefit landowners. The conservation planning process looks at a number of tools landowners can use to meet their goals, whether they have forest, farm, or riparian properties.

### 2. Healthy Streams

Funding and technical assistance is provided to landowners for streamside restoration to improve water quality and wildlife habitat. Current target watersheds in our rural areas, which are eligible for increased cost share, include McCarthy, Abbey, Rock and Crabapple creeks in the West Hills and waterways on Sauvie Island. Fencing to protect and exclude livestock from riparian areas may be included in *Healthy Streams* projects.

### 3. Neighborhood Demonstration Projects

The District assists engaged landowners and community groups, including schools and communities of faith, focused on demonstrating ways to conserve natural resources and/or improve their community's ability to access and learn about growing local food. These on-the-ground conservation projects also serve as education and outreach tools to the larger community through signage, tours and public access/visibility. Some of these projects, like the *Meadowscaping* program, are testing new techniques to conserve natural resources, so that we might learn from and showcase such practices.

### 4. EDRR (Early Detection, Rapid Response) Invasive Species Program

The *EDRR Invasive Species Program* focuses on prevention and spread of high-priority invasive species that are not yet well established in our region. The District works closely with landowners and partnering agencies to strategically manage target species on a local and regional scale. In addition, this program seeks to raise awareness of priority invasive plants through direct outreach and *Weed Watcher* workshops.

### 5. Partner Organization Funding

The *Financial Incentives for Sustainable Habitats* (FISH) program advances the mission of the District by leveraging funds through conservation-related work carried out by partner organizations and cooperating landowners. This program provides cost-share funds (up to \$10,000/project) to support conservation projects, conservation education, and community events that promote natural resource conservation. The District's Partner Funding programs provide strategic financial support to maximize our resources and minimize duplication with other organizations that efficiently and effectively perform

work that supports our goals. Generally, Partner Funding supports pre-existing programs within partnership organizations while the District's FISH Grant program supports new projects.

## 6. Sturgeon Lake

Dedicated funding has been allocated for the restoration of this 3,200 ac. wildlife refuge, owned and managed by Oregon Department of Fish and Wildlife. This lake is a critical habitat for endangered salmon, sturgeon and lamprey and is an integral part of the Pacific flyway for pacific coast migratory waterfowl. It is one of the premier natural and biologically significant aquatic and wildlife habitats in the state. Sturgeon Lake is identified in the Oregon Conservation Strategy as a "conservation opportunity area" and restoring flushing flows to the lake for salmon habitat restoration is specifically named as a state strategy. The District, US Army Corps of Engineers, and the Sturgeon Lake Restoration Partners are seeking to reopen the Dairy Creek channel, including installing a bridge to allow it to pass under Reeder Road. This project will be completed by 2020.

## 7. Outreach & Education Programs

The District provides media and consumer outreach and education, including workshops and trainings, on a wide range of conservation issues related to invasive weeds, native plants, stormwater management, farm and forestry practices, wildlife and restoration. We also provide financial and technical support to a variety of school and non-profit organizations engaged in educating students of all ages in conservation, clean watersheds, soil composition, and organic gardening.

## 8. Stormwater Programs

The urban sections of our District have many water and soil health challenges due to development, infrastructure and other urban pressures. In response to these pressures and their impacts to natural resources, the District offers direct landowner technical assistance and educational workshops and materials to help landowners better manage stormwater on their land.

## 9. Priority Habitat Restoration

Throughout our District staff help provide technical assistance to landowners to help restore priority habitats, which include oak woodland/savanna, upland forest and riparian zones. Conservation planning and cost share assistance are only provided in target areas which may be determined by watershed, geographic boundaries, number of contiguous landowners engaged and/or proximity to larger "anchor" habitats. In addition, there are some unique projects embedded in this area that aim to engage and educate landowners in aspects of restoring their land while providing some direct on-the-ground and/or technical assistance; the *Canopy Weed Program*, for example, provides treatment of invasive vines (ivy and clematis) that threaten a wide host of habitat types in target geographical areas.

## 10. Working Lands (agriculture and forestry)

The District seeks to ensure working lands stay in production while also enhancing conservation goals on each site and surrounding landscape. The District works with farmers to buffer waterways, provide pollinator and beneficial insect habitat, and manage nutrient inputs. The District also assists livestock and horse owners with mud, manure and pasture management to limit the movement of nutrients and bacteria into waterways and control weeds. On forest properties the District helps landowners improve forest health, reduce wildfire risk, enhance wildlife habitat,

and plan thinning operations to improve tree vigor and reduce sedimentation to streams from roads and trails.

## 11. Soil Health

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The District helps crop producers improve soil health to increase production and/or reduce fertilizer and pesticide inputs. In the urban realm, the District provides landowner guidance and workshops on restoring disturbed soils. The District works with landowners on the four principles of soil health: 1) minimize disturbance, 2) diversity above ground equals diversity below ground, 3) provide a living root year round, and 4) maintain cover over bare soil year round. The District provides incentives for farmers to try cover crops and works with OSU extension to provide recommendations. The District also works with the NRCS to enroll farmers in Farm Bill programs which further encourage the adoption of these practices.

## CONSERVATION OPPORTUNITY AREAS AND ISSUES

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The District has outlined three conservation opportunity areas: the Rural West Hills, Multnomah Channel and Sauvie Island, and the Urban area. Listed below are some of the associated issues of concern and potential conservation opportunities within these areas.

### 1. RURAL WEST HILLS (includes a section of the Tualatin Mountains): Abbey, Crabapple, McCarthy, and Rock Creeks

#### Abbey/Rock Creeks

##### Issues:

- Early detection, Rapid response (EDRR) invasive plant species
- Forests impaired by blackberry, ivy, holly, and other invasive species
- Inadequate native riparian vegetation
- Oak woodlands with weed problems and conifer encroachment
- Water Quality, particularly temperature (The Tualatin River is WQ-limited for temperature; District data suggest temperature and sediment are issues in McCarthy & Crabapple)
- Horse stables and concentrated livestock areas may impair water quality via nutrients and bacteria
- Overgrazed areas contribute to soil compaction and erosion as well as weed encroachment
- Livestock access to streams
- Lack of species diversity in forest stands
- Highly Erodible Lands (HEL)

##### Opportunities:

- Riparian restoration
- Oak habitat, wetland, and pond enhancements
- Mud and manure control, pasture management
- Fencing to exclude livestock from streams
- Invasive species control

- Forest stand management/restoration

### **Crabapple Creek**

#### Issues:

- Forests impaired by blackberry, ivy, holly, and other invasive weeds, including EDRR species
- Denuded streams at Wildwood golf course and higher in the watershed
- Lack of species diversity in forest stands
- Out of all the watersheds in the District, this one has the most acreage managed with forest clear-cuts
- Warm summertime stream temperatures

#### Opportunities:

- Green golf course certification and Wildwood golf course riparian enhancement
- Forest stand management/restoration

### **McCarthy Creek**

#### Issues:

- Overstocked forest stands where forest health is depleted, as well as clear-cut areas not adequately reforested
- Inadequate or downward trending native riparian vegetation along this salmon-bearing stream, particularly on the mainstem middle and lower reach, impacts soil erosion, water quality, fish and other wildlife habitat, and wildlife corridors.
- EDRR species present
- Erosion and water quality, i.e. sediment and temperature, impairment from aforementioned land-use conditions and effects on fish habitat and roadways
- Forests impaired by blackberry, ivy, holly, and other invasive species (including knotweed along streams)
- Upland habitat connectivity may be limited; wildlife need a corridor from Forest Park to rest of the Coast Range
- Excess sediment in McCarthy Creek; high summertime stream temperatures

#### Opportunities:

- Riparian and other wetland habitat restoration
- Control of EDRR species & other priority invasive species including canopy weeds
- Upland habitat enhancement
- Conservation enhancements for water quality & erosion control on forest / private roads
- Invasive species control
- Forest stand management/restoration

## **2. MULTNOMAH CHANNEL AND SAUVIE ISLAND**

### **Multnomah Channel**

#### Issues:

- Insufficient side channels and connected wetlands for salmonid refugia
- Invasive species, particularly reed canary grass invading ~30 acres at Wapato Access area, and elsewhere; scattered yellow flag iris, possible indigo bush (mostly along the Columbia)

- Hydrology altered by Columbia River dams (diminished spring freshets, loss of wetland connectivity)
- Loss of large tree canopy and adequate riparian forest buffers along the waterway, in part due to removal at moorages / floating home communities
- South facing slopes in the watershed with Oregon white oak in need of protection
- Industrial land uses contaminated with toxins (Portland Harbor Superfund) along the main stem of the Willamette River
- EDRR species & other more common invasive species
- Impaired water quality and habitat from specific houseboat and moorage practices

#### Opportunities:

- Restoration of forested wetland in low lying areas and streams along Multnomah Channel in partnership with Metro and NRCS
- Aquatic EDRR invasive plant control with ODA
- Education and outreach, including development of BMPs for living on the water, and potential pilot projects at moorages, such as shoreline habitat enhancement and water quality swales

### **Sauvie Island**

#### Issues:

- Sturgeon Lake, the largest lake on the island, is filling with silt due to hydrologic issues
- Reed canary grass and other invasive species dominate wetlands and some ponds
- Significant lack of riparian vegetation along the Gilbert River and other canals contributes to bank sloughing, soil erosion, reduced uptake of excess nutrients, and lost diversity of pollinator and other wildlife habitat and corridors.
- Reed canary grass and other invasive species dominate wetlands and some ponds
- Sheet erosion on farm fields without vegetation cover
- Livestock access to moist soils contributes to soil compaction, weed spread and mud issues
- Degraded oak woodlands, including invasive plant encroachment
- Unproductive or under-used open areas or habitats, often overtaken by invasive weeds
- Overuse of nitrogen-based fertilizers by farmers is creating water quality concerns
- Soil health/quality
- Horse stables and concentrated livestock areas may impair water quality via nutrients and bacteria
- Loss of historic grassland habitat and prairie habitat
- Diminished wetland habitat; there has been a 45% reduction in open bodies of water on Sauvie Island since 1944. (Bennet, Joelle. "Dairy Creek Planning Workshop January 2012." HDR, Inc. Portland, Oregon. 01 12 12.)
- Loss of historic oak savanna
- EDRR species

#### Opportunities:

- Riparian planting projects along the Gilbert River, other waterways and canals and ponds
- Marginal farmland and wetland restoration
- Sturgeon Lake Restoration Project

- Landowner education re: regionally specific habitats, such as oak woodlands and savanna, and wildlife, including pollinators
- Oak and grasslands/prairie restoration projects, including those in conjunction with ODFW and Oregon State Parks
- Plant pollinator hedgerows
- Landscape mapping of restoration opportunity areas in conjunction with Sauvie Island Habitat Partnership
- Sauvie Island Pond Project: private pond habitat enhancement for amphibians and turtles
- Sauvie Island Soil Health Program
- Mud and manure control, pasture management
- Invasive plant management, including EDRR species

### **3. URBAN: Tualatin River Headwaters, Forest Park Watersheds, Tryon Creek and West Willamette Watersheds**

#### **Tualatin River Headwaters (includes Fanno and Cedar Mill Creeks)**

##### Issues:

- The primary land use in this watershed is single-family residential housing, with very limited parks and open space.
- The watershed contains steep slopes and mainly sandy clay loam soil.
- Streets, parking lots, and buildings contribute to large impervious surface areas.
- Narrow riparian corridors commonly consist of native species like western red cedar, Douglas fir, vine maple, and sword fern, as well as invasive species like English ivy and Armenian blackberry.
- Native fish populations are limited, however, steelhead and cutthroat trout are present in upper Fanno Creek. Steep slopes and poorly draining soils are prevalent
- Numerous water quality impairments exist in this watershed including temperature and sedimentation.
- EDRR species
- Unimproved Right of Ways/Streets have sedimentation/drainage/filtration stormwater runoff issues

#### **Forest Park Watersheds (includes Balch & Linnton's Willamette Watersheds)**

##### Issues:

- Substantial ivy, clematis and other invasive species bordering Forest Park, a crucial urban "anchor" habitat type
- Soil erosion along steep hillsides
- EDRR species
- Balch Creek water quality—High *E. coli* counts as well as other impairments including sedimentation
- Impaired wildlife corridor connections from Willamette River to Tualatin Mountains on US Highway 30
- Industrial land uses along the main stem of the Willamette River including the Portland Harbor Superfund
- Overstocked forest stands where forest health is depleted with potential fire risk



## **Tryon Creek and West Willamette Watersheds**

### Issues:

- Degraded natural areas—choked with common and EDRR invasive species (blackberry, ivy, clematis, etc.)
- Water runoff/quality (bacteria, oxygen, copper, lead, and temperature are the primary water quality parameters of concern)
- Relatively high proportion of impervious surface relative to total area
- Development in the floodplain and alterations in channel banks have destroyed or degraded floodplain and off-channel habitats.
- Unimproved Right of Ways/Streets have sedimentation/drainage/filtration stormwater runoff issues
- Wildlife corridor barriers (including fish passage of salmonid species)

### Urban Opportunities:

- Priority habitat restoration
- Stormwater management improvement projects
- Wildlife enhancement and access projects
- Conservation education for landscape contractors & landowners
- Urban Watershed Mentors; a volunteer leadership conservation plan and implementation training and engagement program
- Demonstration gardens
- Pollinator improvement projects – Including *Meadowscaping* and citizen scientist monitoring
- Targeted invasive treatments: Canopy Weed Programs & EDRR
- Soil restoration trials
- Engage diverse audiences through equity policy identified initiatives

## DISTRICT CAPACITY

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### *Staff*

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The current staff consists of six full time employees and four part time employees. Additional seasonal employees (interns) are hired to assist with restoration and other conservation related projects as needed during the spring and summer. The District also relies on outside contractors to fulfill some of its conservation work objectives.

#### **District Manager** – 1 FTE

This position supports the District's conservation mission by working directly with our elected board, and with a wide variety of organizations and individuals, such as local, regional, state and federal government agencies, non-profits, citizens, community groups, elected officials, and private businesses, to move forward the goals and initiatives of the District. In particular, this position is instrumental in all fundraising goals and overall program management related to the multi-year Sturgeon Lake /Dairy Creek Restoration project. This position oversees all staff in support of District programs.

#### **Controller and Budget Officer** – .8 FTE

This position is responsible for ensuring that the organization is fully compliant with Local Budget Law, Oregon Public Contracting Law, and all other laws and regulations pertaining to public funds. This position is also responsible for a comprehensive system of fiscal and budgetary controls and reporting functions. In addition to financial oversight and budgeting responsibilities, this position oversees office management and human resources.

#### **Office Manager** – 1 FTE

This position is responsible for Board of Director meeting preparations, providing administrative support to District Manager and office staff, and facilitating all tasks related to office operations, vendor issues, office equipment, supplies, and personnel-related needs.

#### **Senior Conservationist** – .9 FTE

This position provides program management, technical staff coordination, and conservation planning and technical assistance to landowners primarily in the portion of the District's service area that is outside the City of Portland (including all of Sauvie Island). This position manages the District's *Healthy Streams* program and assists, primarily rural, land managers with special habitat, farm planning and education projects, and provides mentoring to the technical staff team.

#### **Forest Conservationist** – 1 FTE

This position provides conservation planning and technical assistance to woodland owners throughout the District and oversees all forestry management programs. Responsibilities include: conservation plan creation, native and invasive plant identification, field work & data collection including forest stand measurements and analysis, GIS/GPS mapping, community outreach, development of local forestry initiatives, report & article writing, project management, grant management, and program budget management.

#### **Rural Conservationist** – 1 FTE

This position provides conservation planning and technical assistance to landowners primarily in the portion of the District's service area that is outside the City of Portland (including all of Sauvie Island) and runs the farm & livestock conservation, soil health, water quality monitoring, Sturgeon Lake restoration and Internship programs. Other responsibilities include: conservation plan creation, field

work & data collection, GIS/GPS mapping, community outreach, report & article writing, project management, grant management, project and partner coordination and funding.

**Urban Conservationist** – 1 FTE

This position provides conservation planning and technical assistance to landowners in the District's service area within the City of Portland and runs the urban conservation programs (including Urban Watershed Mentors training, stormwater management, canopy weed, demo gardens, habitat restoration and conservation-related presentations to community groups). Responsibilities include: conservation plan creation, native and invasive plant identification, field work & data collection, GIS/GPS mapping, community outreach, report & article writing, project management, grant management, project and partner coordination and funding.

**Invasive Species Program Coordinator** – 1 FTE

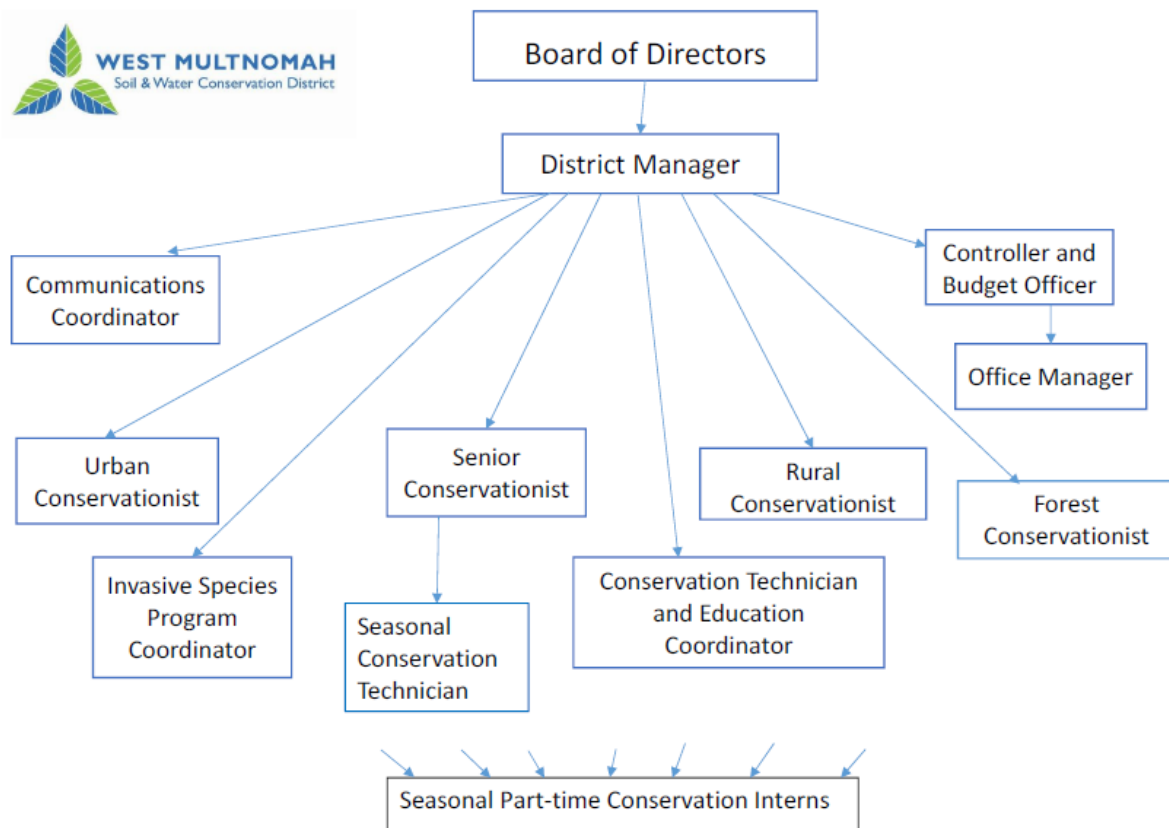
This position provides invasive species management plan creation, data tracking and program budget management, and coordination of the District's early detection-rapid response (EDRR) invasive plant program. Other responsibilities include managing the ODA OSWB grant, the Weed Watchers program, GIS/GPS mapping, community outreach, report & article writing, project management, and other invasive species-related programs and projects. Provides conservation planning and technical assistance to landowners, and participates in the local Cooperative Weed Management Area (CWMA) and other related interagency organizations and community groups.

**Conservation Technician/Education Coordinator** – 1 FTE

This position provides assistance to conservationist/technical staff with field work, outreach efforts and data collection and management. This position also coordinates the Conservation District's K-12 and garden program and manages outreach efforts related to the website and social media.

**Communications Coordinator** – .6 FTE

This position provides internal and external communications services for the District. This includes creating District marketing, branding and educational materials, including publications, newsletters, and Annual Reports and other materials such as signage to promote the District and its programs. Additionally, this position manages all publicity and media relations for the District, assists staff to determine how to reach constituents, message and deliver program information, manages signature annual workshops and events, and assists District Manager in fundraising and communications related to the Sturgeon Lake Restoration Project. This position also manages the District website and social media content.



## *Board of Directors*

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The Board of Directors consists of seven members elected countywide by voters. The Board works on a volunteer basis to set policy, plan goals, and enact a yearly budget for the District. Individual directors initiate and manage specific resource conservation projects through their involvement in watershed councils and non-profit organizations.

## *Volunteers*

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Volunteers include our associate directors and budget committee members. Additionally, community members help us with outreach efforts.

## *Partnerships*

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The District relies on partnerships with other local agencies and non-profit institutions to further its natural resource conservation goals. These partners are listed above in the Roles and Responsibilities section.

## *Facilities and Equipment*

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Staff is housed in the District's office, located in NW Portland, in the historic Montgomery Park office building at 2701 NW Vaughn Street, Suite 450; the District offices have been at this location since 2004. In 2009, the District signed an agreement with OSU Extension to house the Multnomah County Master Gardeners Hotline and volunteers at the District office.

Staff workstations are equipped with computers and phones. Staff share a copier and printer. Additional equipment includes a server and disk storage. The district owns three vehicles: a 2009 Ford Escape Hybrid (SUV Hybrid), a 1998 Ford Explorer (SUV), and a 2003 GMC Sonoma (Truck).

## *Funding*

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The District receives its funding primarily from property taxes and grants.

In 2006, voters in the District's service area approved a tax base beginning in fiscal year 2007-2008. This measure established a permanent rate limited at \$0.0750 (7.5¢) per \$1,000 of assessed property value.

Specific natural resource conservation projects are funded through grants from:

- Oregon Department of Agriculture (ODA)
- Oregon Watershed Enhancement Board (OWEB)
- Natural Resources Conservation Service (NRCS)
- Oregon State Weed Board
- Metro (Nature in Neighborhoods Grant)

The current fiscal year's budget is included in Appendix D.

## APPENDIXES

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### Appendix A: General Powers of Soil and Water Conservation District Directors

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ORS 568.550(1). The board of directors of a soil and water conservation district has the following powers: [*Letters correspond to actual statute format.*]

- a. To secure surveys and investigations and do research relating to:
  - The character of soil erosion
  - The character of floodwater and sediment damage
  - All phases of the conservation, development, utilization and disposal of water
  - The preventive measures, control measures and improvements needed
- b. To conduct demonstrational projects on lands within the district upon obtaining the consent of the owner and occupier of such lands.
- c. To carry out preventive and control measures on lands within the district upon obtaining the consent of the owner and occupier of such lands.
- d. To enter into written agreements (*see specifics in 568.330[(d)][A]&[(B)]*)
- e. To obtain options upon and to acquire by purchase, exchange, lease, gift, grant, bequest or devise any property, real or personal or rights therein, (*see specifics in 568.330[e]*)
- f. To borrow money and to mortgage personal property of the district as security (*see specifics in ORS 568.330[ff]*)
- g. To issue general obligation bonds of the district as provided in ORS 568.803
- h. To make available, on such terms as the directors shall prescribe, to landowners or occupiers within the district, agricultural and engineering machinery and equipment, fertilizer, seeds and seedlings and other material or equipment.
- i. To construct, operate and maintain such structures as may be necessary or convenient for performance of any of the operations authorized in ORS 568.210 to 568.880 and 568.900 to ORS 568.933.
- j. To develop comprehensive plans and specifications for the conservation of soil resources and for the continued control of soil erosion within the district, and to publish such plans, specifications and information and bring them to the attention of owners and occupiers of the lands within the district.
- k. To take over, by purchase, lease or otherwise, and to administer, any soil conservation, erosion control or erosion prevention project, or combination thereof, located within district boundaries undertaken by the United States or any of its agencies, or by this state or any of its agencies.
- l. To manage, as agent of the United States or any of its agencies, or of this state or any of its agencies, any soil conservation, erosion control or erosion prevention project, or combination thereof, within district boundaries.
- m. To act as agent for the United States or any of its agencies, in connection with the acquisition, construction, operation or administration of any soil conservation, erosion control or erosion control project, or combination thereof, within district boundaries.
- n. To accept donations, gifts and contributions in money, services, materials, or otherwise from the United States or any of its agencies, or from this state or any of its agencies, and to use or expend such moneys, services, materials or other contributions in carrying on its operations.
- o. To sue and be sued in the name of the district, to have a seal, which shall be judicially noticed, to have perpetual succession unless terminated as provided by law, to make and execute contracts and other instruments necessary or convenient to the exercise of its powers, and to make, and from time to time amend or repeal, rules not consistent with ORS 568.210 to 568.808 and 568.900 to 568.933 to carry into effect its purposes and powers.

- p. To purchase liability or indemnity insurance, in such amounts and containing such terms and conditions as the board believes necessary for the protection of directors, officers and employees of the district against claims incurred in the performance of their duties.
- q. To place liens on real and personal property.
- r. To enter into written agreements with, coordinate activities with and provide assistance to landowners, managers and residents within the districts and federal, state and local governments, relating to natural resource issues, including but not limited to issues of:
  - Agriculture and forestry
  - Economic development based upon natural resources
  - Watershed management and ecosystem health
  - Invasive species
  - Alternate and renewable energy
  - Air Quality
  - Animal waste and nutrient management
  - Carbon sequestration
  - Access to market-based services and certification
  - Fuel reduction and wildfire planning and management
  - Preservation of agricultural, forestry and other lands
- s. To conduct outreach and conservation education activities.
- t. To provide financial assistance, including but not limited to loans and grants to implement activities and projects authorized under ORS 271.715 to 271.795, 569.210 to 568.808 or 568.900 to 568.933.
- u. To hold patents, trademarks and copyrights.
- v. To hold conservation easements under ORS 271.715 to 271.795.

ORS 568.550(2). As a condition to the extending of any benefits under ORS 568.210 to 568.808 or 568.900 to 568.933 to lands or the performance of work upon lands, the directors may require contributions in money, services, materials or otherwise to any operations conferring such benefits, and may require landowners or occupiers to enter into and perform such agreements or covenants as to the permanent use of such lands as will tend to prevent or control erosion thereon.

ORS 568.550(3). In order to avoid duplication of activities under subsection (1)(a) of this section, the department may call upon other state and federal agencies for assistance and cooperation in their fields in accordance with memoranda of understanding to be signed by all cooperating agencies.

ORS 568.550(4). A district may not adopt land use regulations under ORS chapter 197, 215 or 227. A district has the standing of an affected landowner to participate in the public process involving administrative rules, regulations, goals, guidelines, plans or other public body actions that may affect one or more properties within the district.

## Appendix B: Statutes and Administrative Rules

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The District is specifically governed by Oregon Revised Statutes (ORS) 568.210 through 568.890. In addition, the Clatsop SWCD is subject, but not limited to, the conditions of several statutes and administrative rules as follows:

- ORS 568.900 through 568.933 (Agricultural Water Quality Management)
- ORS 561.395 (Soil and Water Conservation Commission)
- ORS 561.400 (Natural Resources Division)
- ORS 44.320 (Oath of Office)
- Oregon Constitution, Article XV, Section 3 (Oath of Office)
- ORS 190.003 through 190.110 (Intergovernmental Cooperation)
- ORS 192.001 (Public Records Policy)
- ORS 192.005 through 192.190 (Custody and Maintenance Records)
- ORS 192.310 (Records and Reports)
- ORS 192.410 (Inspection of Public Records)
- ORS 192.610 through 192.710 (Public Meetings)
- ORS 198.010 through 198.955 (Special Districts)
- ORS 198.330 through 198.365 (Dissolution of Inactive Districts)
- ORS 198.410 through 198.440 (Recall)
- ORS 240.379 through 240.394 (Employment of Persons with Severe Disabilities)
- Title VII, Civil Rights Act of 1964 (Equal Opportunity Employment/Sexual Harassment/Discrimination) (Federal)
- Americans with Disabilities Act of 1990 (Hiring Persons with Disabilities) (Federal)
- ORS 244.010 through 244.4000 (Conflict of Interest)
- ORS 247.035 (Residency)
- ORS 294.305 through 294.565 (Local Budget) (required of districts with a tax levy)
- ORS 297.005 through 297.712 (Contracting)
- ORS 297.405 through 297.485 (Municipal Audits)
- ORS 542.750 (watershed Protection and Flood Prevention)
- ORS 659.010 through 659.990 (Employment Practices)
- ORS 659.405 (State Policy/Employment of Disabled Persons)
- OAR 839-07-550 through 839-07-656 (Sexual Harassment Prevention)



## Appendix C: Acronyms used in this Business Plan

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<b>AWQMP</b>	Agriculture Water Quality Management Program
<b>BMP</b>	Best Management Practices
<b>CWMA</b>	Cooperative Weed Management Area
<b>DEQ</b>	Department of Environmental Quality (Oregon)
<b>DSL</b>	Department of State Lands (Oregon)
<b>EQIP</b>	Environmental Quality Incentives Program
<b>ESA</b>	Endangered Species Act (Federal)
<b>EWPP</b>	Emergency Watershed Protection Program
<b>FTE</b>	Full Time Equivalent Employee (2080 hours/year)
<b>GIS</b>	Geographic Information Systems
<b>HEL</b>	Highly Erodible Land
<b>LAC</b>	Local Advisory Committee
<b>LMA</b>	Local Management Agency (Oregon SB1010)
<b>MOU</b>	Memorandum of Understanding
<b>NACD</b>	National Association of Conservation Districts
<b>NOAA</b>	National Oceanic and Atmospheric Administration
<b>NMFS</b>	National Marine and Fisheries Service
<b>NWMP</b>	Northwest Weed Management Partnership
<b>NRCS</b>	Natural Resources Conservation Service (formerly SCS)
<b>OACD</b>	Oregon Association of Conservation Districts
<b>OAR</b>	Oregon Administrative Rule
<b>OCEAN</b>	Oregon Conservation Employees Association Network
<b>ODA</b>	Oregon Department of Agriculture
<b>OFRI</b>	Oregon Forest Resources Institute
<b>ORS</b>	Oregon Revised Statute
<b>OSU</b>	Oregon State University
<b>OSWB</b>	Oregon State Weed Board (ODA)
<b>OWEB</b>	Oregon Watershed Enhancement Board
<b>SCS</b>	Soil Conservation Service (currently NRCS)
<b>SDAO</b>	Special Districts Association of Oregon
<b>SB1010</b>	Agricultural Water Quality Management Act of 1993 (OR)
<b>SWCC</b>	Soil and Water Conservation Commission
<b>SWCD</b>	Soil and Water Conservation District
<b>USDA</b>	United States Department of Agriculture
<b>USFS</b>	United States Forest Service
<b>WRP</b>	Wetland Reserve Program

## Appendix D: Budget

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<b>General and Special Funds</b>	<b>Adopted Budget FY 2018-19</b>
Beginning Fund Balance/Net Working Capital	995,094
Federal, State and All Other Grants, Gifts, Allocations and Donations	380,178
All Other Resources Except Property Taxes	58,469
Property Taxes Estimated to be Received	1,595,000
<b>Total Resources</b>	<b>3,028,741</b>

Personnel Services	1,187,610
Materials and Services	900,439
Capital Outlay	67,500
Contingencies	50,000
Reserved for Future Expenditures	25,000
Unappropriated Ending Balance	798,192
<b>Total Requirements</b>	<b>3,028,741</b>



## Introduction

The District's annual work plans form an integral part of and should be read in conjunction with the District's [Long Range Business Plan](#) and [Adopted Budget](#). Our annual work plans address the long-term conservation opportunities and associated concerns that are discussed in our Long Range Business Plan. Our District budget is based on the annual work plans proposed to our Board at the beginning of the budget process. Through consideration of our goals and also short-term factors, our annual work plans were finalized based on the approved and adopted budget for FY 2018-2019.

## Annual Measurement of Progress on Goals to Fulfill our Mission

The District's mission is to conserve and protect soil and water resources for people, wildlife, and the environment. The District operates around six strategic goals to fulfill our mission: (1) improve water quality in our watersheds; (2) minimize erosion and build healthy soils; (3) enhance habitats, biodiversity and ecosystem function; (4) enhance the productivity and sustainability of working lands; (5) cultivate land stewards of all ages; and (6) ensure that the District is a vibrant agency.

These broad strategic goals help focus our efforts to ensure that we are working toward the same end. Each program area Annual Work Plan contains a comprehensive list of the strategies, objectives and metrics by which we strive to achieve our goals and measure progress. We measure our progress, summarized in the table below, annually.

Metrics	FISCAL YEAR TOTAL				Goals					
	2015- 2016	2016- 2017	2017- 2018 Est.	2018- 2019 Goals	Water Quality	Healthy Soil	Habitat & Ecosystem	Working Lands	Land Stewards	Vibrant Agency
Conservation Plans Completed	34	39	40	41	✓	✓	✓	✓		
On-the-Ground Project Spending	\$ 238,114	\$ 233,454	\$ 234,000	\$ 241,020	✓	✓	✓	✓		
Landowners Served	649	825	825	850	✓	✓	✓	✓	✓	✓
Acres Treated for Invasive Plants	237	129	130	134	✓	✓	✓			
Acres of Native Habitat Enhanced	281	251	250	258	✓	✓	✓	✓		
Native Plants Installed	150,004	55,623	55,000	56,650	✓	✓	✓	✓		
Linear Feet of Streams/Banks	28,261	46,090	46,000	47,380	✓	✓	✓			
People Served at Outreach Events	3,585	1,237	2,000	2,060					✓	✓
Acres of Cropland Improved through Soil	-	38	38	39		✓		✓		
Public Meetings Held (Board Meetings, DEI Meetings, Annual Meeting)	15	17	17	18						✓
Recognition Awards	7	5	5	5						✓
Partners Engaged	-	44	59	61						✓

## Annual Work Plans by Program Area

On the following pages, our annual work plans are presented by program area. Acronyms used throughout the annual work plans are defined in the table below.

4C-CWMA	4 County Cooperative Weed Mngmnt Area	ODFW	Oregon Department of Fish & Wildlife
BC	British Columbia	OISC	Oregon Invasive Species Council
BES	City of Portland, Bureau of Environ. Services	OWEB	Oregon Watershed Enhancement Board
BHCP	Backyard Habitat Certification Program	PBOT	City of Portland Bureau of Transportation
BLM	Bureau of Land Management	PP&R	Portland Parks & Recreation
CSWCD	Clackamas SWCD	PSU	Portland State University
CWS	Clean Water Services	SBWC	Scappoose Bay Watershed Council
DEI	Diversity, Equity, and Inclusion	SOW	Scope of Work
DEQ	Department of Environmental Quality (Oregon)	SRN	Skyline Ridge Neighbors
EDRR	Early-Detection, Rapid Response	SWNI	Southwest Neighborhoods, Inc.
EQIP	Environmental Quality Incentives Program	TCWC	Tryon Creek Watershed Council
FOM	Friends of Marquam	TSCC	Tax Supervising and Conservation Commission
FOT	Friends of Terwilliger	UMP	Unified Monitoring Protocol
FPC	Forest Park Conservancy	USDA-APHIS	United States Department of Agriculture-Animal Plant Health Inspection Service
Friends of TC	Friends of Tryon Creek	USFS	United States Forest Service
HH	Healthy Habitats Program	WRC	Watershed Resource Center (Southwest)
HSP	Healthy Streams Program	WSDA	Washington State Department of Agriculture
JCWC	Johnson Creek Watershed Council	WWRP	West Willamette Restoration Partnership
LRBP	Long Range Business Plan		
NIN	Metro Nature in Neighborhoods		
NNRG	Northwest Natural Resources Group		
NRCS	Natural Resources Conservation Service		
NWNW	Neighbors West Northwest		
ODA	Oregon Department of Agriculture		
ODF	Oregon Department of Forestry		

2018-19 CONSERVATIONIST & EDUCATION COORDINATOR ANNUAL WORKPLAN (OVERALL GOALS)					TIME PERIOD				% ANNUAL TIME
GOAL (narrow down to priority goals)	PROGRAM	STRATEGIES & ACTIONS	METRIC / OUTCOME	OTHER STAFF AND/OR PARTNERS INVOLVED	Q1 JULY, AUG, SEPT	Q2 OCT, NOV, DEC	Q3 JAN, FEB, MAR	Q4 APR, MAY, JUNE	
1, 2, 3	Healthy Streams & Habitats, Forestry	Restoration Project Maintenance: monitor sites for maintenance needs, develop SOWs, coordinate and supervise maintenance crews, and perform follow-up quality checks of crew work	22+ Healthy Streams Sites maintained 4 Healthy Habitats Sites maintained 14 Forestry Sites maintained	Senior Conservationist Forest Conservationist	x	x		x	9%
1, 2, 3	Healthy Streams & Habitats, Forestry	Planting + planting plan development	5 Healthy Streams/Habitats Sites planted 9 Forestry Sites planted	Senior Conservationist Forest Conservationist		x	x		5%
2, 3	Healthy Streams & Habitats, Forestry	Fall seeding + seeding plan development	1-3 Healthy Streams/Habitats Sites seeded 2-3 Forestry Sites seeded	Senior Conservationist Forest Conservationist	x	x			2%
1, 2, 3	Healthy Streams & Habitats, Forestry	Spring UMP Monitoring (office prep, field work, data management and reporting)	5 Healthy Streams/Habitats Sites monitored 13 Forestry Sites monitored	Senior Conservationist Forest Conservationist				x	7%
1, 2, 3	Healthy Streams & Habitats, Forestry	Fall Survival Monitoring (office prep, field work data management and reporting)	28 Healthy Streams/Habitats Sites qualitatively monitored and ~50% of those also quantitatively monitored. 12 Forestry Sites monitored qualitatively and quantitatively	Senior Conservationist Forest Conservationist	x	x			13%
2, 3	Forestry	Monitor Understory Revegetation CIG projects	8 Forestry Sites monitored twice per year	Forest Conservationist	x			x	5%
1, 2, 3	Healthy Streams & Habitats, Forestry	Site Inventories for new projects	1-2 Healthy Streams/Habitats Sites inventoried 5-8 Forestry Sites inventoried	Senior Conservationist Forest Conservationist	x	x	x		4%
4, 5	Healthy Streams & Habitats, Forestry	Provide landowners technical assistance, including conservation plans, with science -based conservation information.	1-3 Conservation or Forest Stewardship Plans written	Senior Conservationist Forest Conservationist	x	x			5%
1, 2, 3	Healthy Streams & Habitats	GIS mapping assistance for programatic, special projects and fulcrum upkeep	Programatic maps for HSP/HH Programs and Fulcrum data updated annually	Senior Conservationist	x	x	x		4%
1, 2, 3	Healthy Streams	Targeted outreach to recruit new HSP participants	1-2 priority land owners contacted and enrolled	Senior Conservationist	x				1%
6	District-wide	Communication among staff and clients to implement conservation work	Clear conscise communication among staff. Prefessional informative responses to clients and partners with 1-3 day turn-around.	All Staff	x	x	x	x	9%
5	Education	Pollinator monitoring program coordination	12-20 return volunteers engaged in 2018 12-20 properties monitored 3-6 times 15-20 volunteers recruited and trained in 2019	Communications, The Xerces Society, Oregon Master Naturalist Program	x	x		x	9%
5	Education	School, Community Garden & Environmental Education program coordination	4-7 gardens provided with technical assistance and funding 3 schools provided with environmental education programing and funding	Communications, Admin Staff	x	x	x	x	6%
5	Education	Education Partner Funding coordination	3-4 Partners engaged to support environmental education in our district.	Admin Staff, Oregon Master Naturalist Program, Dig In Community, Friends of Tryon Creek, Sauvie Island Center			x		3%
5	Communications & Ourtreach	Assist Communications (newsletter articles, annual meeting & report prep, videos, tabling, zoo education, etc.)	3-4 Newsletter articles written Annual report content developed for Education and Healthy Streams programs	Communications	x	x	x	x	4%

2018-19 CONSERVATIONIST & EDUCATION COORDINATOR ANNUAL WORKPLAN (OVERALL GOALS)					TIME PERIOD				% ANNUAL TIME
GOAL (narrow down to priority goals)	PROGRAM	STRATEGIES & ACTIONS	METRIC / OUTCOME	OTHER STAFF AND/OR PARTNERS INVOLVED	Q1 JULY, AUG, SEPT	Q2 OCT, NOV, DEC	Q3 JAN, FEB, MAR	Q4 APR, MAY, JUNE	
1 - 6	Healthy Streams & Habitats, Forestry, Education	Attend Trainings and Conferences to stay abreast of innovations and best management practices in the field.	2-3 Natural resource oriented trainings or conferences attended	Admin Staff, District Manager	x			x	4%
6	District-wide	Assist with Intern hiring	2 excelent interns hired	Intern supervisor, Admin Staff			x		2%
6	District-wide	Attend meetings (Staff, Techstaff, Board, Annual)	Productive staff and Board collaboration	Staff, Borad of Directors	x	x	x	x	5%
6	District-wide	Cyclical Admin tasks (time sheets, health plan enrollment, employee handbook review, annual work plan, LRBP update as necessary)	Time sheets and health plan enrollment submitted on time 1 annual work plan developed	Admin Staff, District Manager	x	x	x	x	3%

100%

Conservationist 71%  
Education Coordination 18%  
General District Support 11%



2018-19 URBAN ANNUAL WORKPLAN (OVERALL GOALS)					TIMEFRAME				
GOAL (narrow down to priority goals)	PROGRAM	STRATEGIES & ACTIONS	METRIC / OUTCOME	OTHER STAFF AND/OR PARTNERS INVOLVED	Q1 JULY, AUG, SEPT	Q2 OCT, NOV, DEC	Q3 JAN, FEB, MAR	Q4 APR, MAY, JUNE	% ANNUAL TIME
Priority G 6 Additionally, G 1-5	Urban Programs Development Initiative	Urban Conservationist to pursue Executive Masters in Public Administration (EMPA). This program increases the efficacy of public officials for ethical, competent, and effective public service leadership. The program integrates theory and practice through a process of co-production, engaging community groups and citizens, public service executives, academic colleagues, and practitioners with the Center for Public Service.	Complete 18 credits of coursework in leadership, organizational theory, public policy and administrative theory & behavior. Course work will be applied to and of direct benefit to WMSWCD with case studies and recommendations for program areas and initiatives including urban programs, budget administration and diversity, equity and inclusion efforts.	District Manager, Admin staff, Portland State University,	X	X	X	X	15
Priority G 6 Additionally, G 1-5	Urban Programs Development Initiative	Urban Conservationist to complete a capstone project through the EMPA program. Groundwork has been laid to address "unimproved roadway" stormwater impacts including an initial paper exploring the issues and meeting with City staff, landowners and on the same.	Complete a capstone project that will result in meaningful change that utilizes new models to tackle a "wicked challenge" that touches on policy, partnerships and effective public engagement. The planned capstone is focused on SW Portland stormwater issues with an emphasis on the unimproved roadways.	District Manager, BES, PSU, WRC, PBOT	X	X	X	X	5
Priority G 6 Additionally, G 1-5	Urban Programs Development Initiative	Create strategies in response to organizational, administrative and public policy, practice and procedure analysis findings for urban programs (created in FY 2017-18) proposals for improved efficacy and efficiencies.	A plan will be crafted with strategies to improve the efficacy, efficiency and resilience of our urban programing in response to the administrative structure and public policy that influences this work both currently and within the context of predicted future urban growth pressures and climate change impacts.	Admin staff, District Manager, BES, PSU	X	X	X	X	5
Priority G 6 Additionally, G 1-5	Urban Programs Development Initiative	Review and provide input on outreach materials and respond to survey results for City of Portland's NW Expansion Plan. The NW Expansion Plan is a City led effort to explore NW Portland residents stormwater issues and concerns and to respond to the same with on the ground efforts with partners.	City survey information will be reviewed to inform tailored outreach materials will be delivered to NW Portland residents focused on residents priorities, needs and understanding of stormwater issues. The City and WMSWCD will explore helping upstart a NW Watershed Resource center and position.	BES, NWNW, PSU	X	X	X	X	2
Priority G 1-3, Additionally, G 5-6	Urban Technical Assistance	Provide landowners technical assistance with science-based conservation information.	Respond to all incoming calls, emails and walk-ins promptly with conservation information.	Admin staff	X	X	X	X	10
Priority G 1-3, Additionally, G 5-6	Urban Natural Areas Restoration Program	Provide landowners projects >1 acre conservation plans. Work with BES to ensure stormwater recommendations are in alignment.	Create 5 new conservation plans. Secure permission forms for any found priority EDRR invasive plant species. Offer interns opportunity to work on plans.	BES, Invasive Species Program Coordinator, Interns	X	X	X	X	10
Priority G 1-3, Additionally, G 5-6	Urban Natural Areas Restoration Program	Coordinate conservation plan implementation and funding cost-share assistance to landowners in target areas that meet acreage requirements and rank out on top with other criteria (including streams, proximity to other projects/naturals and # of people impacted). Monitor pre-existing and new restoration sites that we provide cost-share funding and project management assistance on.	Manage implementation, including contractor oversight, of 5 continuing project and 1 new project that implement conservation plans that enhance native habitat and watershed health. Ensure treatment of any found EDRR invasive plant species. Monitor 7 sites with the Unified Protocol in the Spring & 4 CWS Survival Monitoring Protocol in the Fall. Track and report out on OWEB Small Grants funding this work.	Admin staff, Invasive Species Program Coordinator, OWEB	X	X	X	X	20

2018-19 URBAN ANNUAL WORKPLAN (OVERALL GOALS)					TIMEFRAME				
GOAL (narrow down to priority goals)	PROGRAM	STRATEGIES & ACTIONS	METRIC / OUTCOME	OTHER STAFF AND/OR PARTNERS INVOLVED	Q1 JULY, AUG, SEPT	Q2 OCT, NOV, DEC	Q3 JAN, FEB, MAR	Q4 APR, MAY, JUNE	% ANNUAL TIME
Priority G 5, Additionally, G 1-3 & 6	Urban Education & Outreach	Educate landowners, gardeners and landscapers on a host of natural resource topics (Provide messages to residents and partners through workshops, mailings, social media, PR, website, tabling events and direct technical assistance).	Table and disseminate district information at 4 events (Zoo, Multnomah Days, Trillium Fest & State of the Watershed) and lead 1 volunteer work party (TCWC State of the Watershed Event) to reach at least 500 residents. Conduct workshops on an on-demand basis. Submit quarterly eNewsletter articles & 2 timely articles for PR. Support communications coordinator to deliver NIN social media campaign & garden tour.	District Manager, Communications Coordinator, BHCP, TCWCI, Friends of Tryon, WWRP	X	X	X	X	5
Priority G 5, Additionally, G 1-3 & 6	Urban Watershed Mentors	Explore Urban Watershed Mentors engagement opportunities. Build capacity and find volunteer opportunities for pre-existing Urban Watershed Mentors.	Identify one site for trained Urban Watershed Mentors to work on and four continuing educational opportunities that participants may attend. Send out opportunities via at least four emails to the listserv.	Dig In, SOLVE, Hands On Greater Portland, WRC, TCWC	X	X	X	X	1
Priority G 5, Additionally, G 1-3 & 6	Urban Stormwater Management	Stormwater Stars: share District developed "Stormwater Stars" Best Management Practice (BMP) factsheets & videos with interested landowners & landscape professionals. Offer design-build workshops to provide hands-on training. Firm up expansion and complete partner MOUs.	Coordinate planning and debrief meeting with Stormwater Stars partners. Provide District BMP training and factsheets to 40 interested landowners & landscapers through 4 design build workshops that enhance 4 sites. Revise webpage, partner MOU, rebranded fact sheets and expansion plan solidified. Provide more year-round participant support and engagement opportunities.	Admin staff, BES, Communications Coordinator, WRC, Verde	X	X	X	X	5
Priority G 3, Additionally G 1 & 2, 5 & 6	Urban Canopy Weeds Program	Coordinate planning and mapping efforts for targeting canopy weed focal areas. Create outreach materials and forms for canopy weed program w/ communications coordinator and partners. Our out a strategy for monitoring pre-existing sites.	Hold partner meeting, select priority area to focus on and compile canopy weed maps. Create landowner letter and permission form for program. Craft and implement a monitoring strategy to assess upkeep. Engage 20 new landowner and monitor sample of pre-existing sites.	Admin staff, Communication Coordinator, FPC, PP&R	X				2
Priority G 3 & 6 Additionally, G 1, 2, 5	Urban Partner Support	Continue to collaborate with regional partners to map & restore key habitats and wildlife corridors within target urban areas. Participate/coordinate meetings with regional partners focused on relevant conservation issues (6 WWRP, 4 TCWC, 1 GFPCI & 2 NIN Grant Partners). Provide follow-up support to partners and landowners following the door-to-door listening and engagement process in SW Portland. Assess overall project successes and capture lessons learned. Continue to develop new partnerships and related opportunities with a focus on culturally-specific partners.	Review/revise existing maps with partners as is needed, complete 1 new urban strategies map w/ interns. Coordinate on localized restoration projects. Participate in the following meetings: 6 WWRP (Current Co-Chair), 4 TCWC, 1 GFPCI, 2 NIN Grant Partners. Continue to coordinate translation service needs and technical information responses. Coordinate 1 debrief meeting to capture partners experiences. Complete final grant report. Revised partner support application and supporting materials, coordinate application process, review & award support and provide partner input/feedback. Serve on Wisdom of the Elders Advisory Council (Discovering Yidong Xinag). Support the GFPCI OWEB project focused on increasing Verde's capacity.	Admin staff, Interns, BHCP, TCWC, WWRP, BES, WRC, FPC, PP&R, Wisdom of the Elders, Verde.	X	X	X	X	10
Priority G 5 & 6 Additionally, G 1-3	Intra-organization communication & support	Participate in staff, tech staff, special board meetings DEI committee and other organization meetings. Reply to information requests promptly.	Attend 18 tech staff meetings, 12 staff meetings, 6 DEI committee meetings and 2 board meetings. Continue to spearhead DEI projects, if requested.	All WMSWCD staff & board, DEI committee	X	X	X	X	10
									100

2018-19 COMMUNICATION'S ANNUAL WORKPLAN (OVERALL GOALS)									
GOAL	PROGRAM	STRATEGIES & ACTIONS	METRIC / OUTCOME	OTHER STAFF AND/OR PARTNERS INVOLVED	Q1 JULY, AUG, SEPT	Q2 OCT, NOV, DEC	Q3 JAN, FEB, MAR	Q4 APR, MAY, JUNE	% ANNUAL TIME
6	District-wide	Write, design and print compelling brochures, books, news releases, and other printed materials to support District programs.	Ongoing	District Manager, Tech Staff	x	x	x	x	8.0
6	District-wide	Communicate the District's work and programs to landowners, partners and media, and manage media coverage.	Ongoing	District Manager, Tech Staff	x	x	x	x	6.0
6	District-wide	Coordinate outreach materials and activities, such as speaking/tabling, at targeted public events and with targeted organizations to provide information about the District and its programs.	Ongoing	All staff	x	x	x	x	7.5
6	District-wide	Manage District website and provide seasonal educational information on website, social media and in newsletters to inform residents of District programs and increase website's ADA access.	Ongoing web work; newsletters are quarterly	All staff	x	x	x	x	8.0
3	District-wide	Provide public outreach regarding the Sturgeon Lake Restoration Project, including a newsletter, with affected landowners, funders, partners, media and general public.	Ongoing	District Manager, Rural Conservationist, CREST, Oregon Wildlife Foundation, BPA, Metro	x	x	x	x	4.0
6	District-wide	Manage and produce Annual Meeting to engage residents in District work and report successes over preceding fiscal year in compliance with state law.	Annual Meeting produced	All staff	x	x		x	3.0
6	District-wide	Manage, edit/write, compile and print Annual Report detailing program success over preceding fiscal year in compliance with state law.	Annual Report produced	All staff	x	x		x	3.0
6	District-wide	Work with staff on events, such as Soil School, and managing those events to inform public about District programs, work and opportunities.	Maintain 100+ attendance at Soil School	Rural Conservationist, Tech Staff		x	x	x	8.0
6	District-wide	Work on District 75th Anniversary event, video, materials.	Anniversary event produced, District historic video produced	District Manager, Office Manager, Videographer, Planning Committee, New Communications Hire	x	x	x	x	5.0

2018-19 COMMUNICATION'S ANNUAL WORKPLAN (OVERALL GOALS)										
GOAL	PROGRAM	STRATEGIES & ACTIONS	METRIC / OUTCOME	OTHER STAFF AND/OR PARTNERS INVOLVED	Q1 JULY, AUG, SEPT	Q2 OCT, NOV, DEC	Q3 JAN, FEB, MAR	Q4 APR, MAY, JUNE	% ANNUAL TIME	
5	Targeted SW neighborhoods	Provide Communications services in accordance with the grant for Connect SW PDX neighborhood engagement campaign, including web page design and maintenance, social media, signage and events.	Tied to grant deadlines	Urban Conservationist, Grant Partners	x	x			4.0	
6	District-wide	Inform and update long-range business plan with input from District residents	Hold 3 Listening Sessions in targeted District Zones	District Manager, Board	x	x			1.0	
6	District-wide	Attend Trainings and Conferences to stay abreast of issues and technology in the communications field.	Ongoing	Admin Staff, District Manager	x		x	x	1.0	
6	District-wide	Attend meetings (Staff, Techstaff, Board, Annual)	Productive staff and Board collaboration	Staff, Borad of Directors	x	x	x	x	2.0	
6	District-wide	Cyclical Admin tasks (time sheets, health plan enrollment, employee handbook review, annual work plan, LRBP updatae as necessary)	Time sheets and health plan enrollment submitted on time 1 annual work plan developed	Admin Staff, District Manager	x	x	x	x	2.0	
FTE									62.5	

2018-19 RURAL ANNUAL WORKPLAN (OVERALL GOALS)						
GOAL	PROGRAM	STRATEGIES & ACTIONS	METRIC / OUTCOME	OTHER STAFF AND/OR PARTNERS INVOLVED	TIMEFRAME	% ANNUAL TIME
3	Sturgeon Lake	Assist CREST with Construction Oversight (with focus on protecting resource concerns and landowner obligations); continue as POC for landowner; mapping for project needs; Fish Salvage with ODFW	Successful implementation of the Sturgeon Lake Restoration Project and set up project for long-term success.	District Manager; Interns (8); Cons Tech (8)	July-Jan	38.5%
3	Sturgeon Lake	Updating funders, reporting and additional fundraising as needed; community outreach	Keep community and funders engaged in project	Communications Coordinator (8), District Manager (8)	Ongoing	2.3%
3	Sturgeon Lake	manage restoration activities on Dairy Creek outside of CREST project area; monitoring (habitat, invasives); Agua-weedwatchers;	Restore and maintain 15 acres of habitat along Dairy Creek. This includes ~7 acres of plants and area outside the construction zone.	Invasives Species (2), Interns (8), Senior Conservationist (4), Const Tech (2)	Ongoing	6.9%
3	Sturgeon Lake	Finalize maintenance plan and work with partners to implement post-construction;	Ensure long-term success of project	District Manager (4)	Ongoing	3.1%
2	Soil Health	Work with NRCS to implement their Soil Health Initiative. Promote cover crops -add acreage of cover crops to existing farms to improve soil health, capture nutrients and reduce weeds.	4 landowners, 40 acres	Communications Coordinator (24 hours),	Ongoing	7.7%
6	Diversity, Equity and Inclusion	Assist SWCD Board and Staff with development of DEI policy, actions and programs.	6 committee meetings, 1-2 trainings, additional partner meetings		Ongoing	5.8%
3	McCarthy Creek WRE	Assist NRCS Senior Conservationist and CREST with activities related to McCarthy Creek Wetland Reserve Easement	Two 6-month reports for Cooperative Agreement, site visits with Senior Cons, assist NRCS with Compatible Use Agreement		Ongoing	5.8%
1	Water Quality Monitoring	Monitoring Water Quality in Target Watersheds (McCarthy, Miller, Crabapple, SIDIC). Create year end report.	8-10 sites in West Hills. Assist with implementation and data analysis associated with SIDIC WQ monitoring	Interns (24 hours)	July-Dec; May-June	2.1%
2	Conservation Planning	Conservation planning with rural landowners with a focus on farms, ranches, horse owners and other ag related landuses.	2-3 plans (include Beovitch, Pastorino)	Forest Conservationist (8 hours), Senior Conservationist (8 hours), Cons Tec (4 hours), Invasives (4 hours), interns (4)	Ongoing	7.7%
5	Education and Outreach	Use diverse forms of outreach appropriate to the audience, e.g. word of mouth, mailings, website, social media, etc.	Submit quarterly eNewsletter articles & 2 timely articles for PR. Support communications coordinator to help deliver Soil School.	6 articles, 100+ attendees at SS	Ongoing	1.9%
5	Education and Outreach	Provide one-time technical assistance for a host of habitat and ecosystem function concerns via phone, email and other communications	Provide direct technical assistance to 40 landowners		Ongoing	3.8%
5	Education and Outreach	Other partnership, outreach, education opportunities as available.	2-4 partnership meetings; 2-4 additional education events, 1 zoo shift. Coordinate WFI Tour or assist Forestry Cons with similar.		Ongoing	1.7%

2018-19 RURAL ANNUAL WORKPLAN (OVERALL GOALS)						
GOAL	PROGRAM	STRATEGIES & ACTIONS	METRIC / OUTCOME	OTHER STAFF AND/OR PARTNERS INVOLVED	TIMEFRAME	% ANNUAL TIME
6	Admin	Program presentations and other attendance needs at board meeting. Other Board interaction	3 board meetings		Ongoing	1.5%
6	All	Grant writing and management as needed to support program areas. Manage existing grants (non-sturgeon lake), serve as OWEB LWW Small Grant Team Leader - work toward transition Team Leader Role to another SWCD; Manage ODA grant	write 1-2 grants to support programs; 4 quarterly reports and 1 application for ODA TA/LMA grant	Admin (16 hours)	Ongoing	4.6%
6	Professional Development	Attend trainings as available	CONNECT, OSSS Conference, 1 additional training		Ongoing	2.7%
6	Assist other staff	Assist other staff as needed			Ongoing	3.8%

100.0%

2018-19 HEALTHY STREAMS ANNUAL WORKPLAN (OVERALL GOALS)									
GOAL	Program	STRATEGIES & ACTIONS	METRIC / OUTCOME	OTHER STAFF AND/OR PARTNERS INVOLVED	Q1 JULY, AUG, SEPT	Q2 OCT, NOV, DEC	Q3 JAN, FEB, MAR	Q4 APR, MAY, JUNE	% FTE
1, 2, 3	Healthy Streams	Manage Healthy Streams (full-funding model) (& Special Habitats) Program; do program management planning & field work -- in McCarthy, Sauvie, & Abbey target watersheds; do outreach as needed; Manage and direct vegetation management contracts to maintain existing HS projects not maintained by landowners; Co-direct monitoring and (use monitoring data to) adaptively manage and re-plant as needed. Collaborate with SIDIC as needed and potentially direct and employ Scappoose Bay Watershed Council to assist with project management and vegetation contractor oversight of McCarthy Creek and Sauvie Island projects, as part of partner funding support. <i>(HS projects restore dense native woody --or herbaceous in certain circumstances-- vegetation to degraded riparian lands, and fence out or otherwise exclude livestock, where needed, to improve water quality, e.g. temperature and sediment, and habitat --for salmonids and other aquatic life, plus terrestrial wildlife, and minimize erosion.)</i>	~22 well-maintained and increasingly healthy existing HSP habitat enhancement projects along 4.2 miles of shoreline and on ~36 acres of priority habitat. 1-3 well managed vegetation management contracts. Clear scopes of work and related documentation. Phase 2 of new lower McCarthy HSP project successfully planted. Other projects re-planted, as needed. <i>Technical Outcomes: Monitoring data collected at &gt;50% of the sites; short-term plant survival &gt;50-75%; increased riparian canopy with longterm increase in streamside shade from &lt;50% to &gt;75%, sediment filtration and reduced stream temperature over the longterm (hard to measure in situ).</i>	technical-support- "Conservationist," Office Manager/Admin. Asst, Invasive Species Prog. Coordinator, possibly SIDIC, SBWC, CWS and TSWCD	X	X	X	X	17%
1, 2, 3	Healthy Streams	Assist technical-support-Conservationist to develop 1-2 new HSP conservation plans	1-3 priority landowners contacted re: opportunity for new projects with 1-2 new plans developed (by "Conservationist")	technical-support- "Conservationist"	X	X	X	X	1%
1, 2, 3	Healthy Streams, NRCS Wetland Reserve Easement	Manage habitat restoration at Enyart WRE on lower McCarthy Creek, including riparian wetlands and upland oak and pollinator habitat; develop and manage vegetation management contracts and scopes of work, prepare planting plans, schedules and specifications, order plants, direct contractors and invoicing, do or direct photo monitoring, coordinate with partners and landowner; provide and review necessary documentation for NRCS	8 acres of well managed riparian and upland areas; 6,000 new wetland / riparian plants installed in winter 2019 + well-designed upland oak and hedgerow plantings. Adequate and timely photo and other documentation provided to NRCS.	NRCS, Rural Conservationist	X	X	X	X	6%
1, 2, 3	Healthy Streams / Partner Funding	Oversee implementation of DEQ grant, including development of an Operations and Maintenance Plan for Sauvie Island Canals and water quality monitoring by SBWC. Work may include development of a pilot project to re-shape or manage eroding canal banks.	Water quality monitoring data for Sauvie Island canals, O&M plan for SI canals, presentations to and engagement of SIDIC board of directors / key stakeholders, identification of pilot projects and new BMPs	SBWC, SIDIC, Rural Conservationist	X	X			3%
1, 2, 3	Healthy Streams / Special Habitats / Rural Partner Funding	Develop and oversee partner agreement with SBWC. Deliverables additional to those noted above may be educational activities for and development of habitat projects at moorages and / or on Sauvie Island and promotion of the (hopefully) just-completed <i>Sauvie Island and Scappoose Bay Bottomlands Conservation Opportunities Strategy</i> (which assumes coordination with The Wetlands Conservancy, Metro, ODFW, State Parks and other major land managers in the planning area). Finalize updates to Living on the Water guide if not completed pre-July 1, 2018. Solicit input on both documents from Invasive Species staff, as needed.	Partner agreement in place with Scappoose Bay Watershed Council. Deliverables received from SBWC, e.g. 1-2 effectively designed and implemented educational activities or habitat projects for moorage and marina residents and owners on best management practices and / or water-quality and habitat related conservation practice(s). Updated <i>Living on the Water</i> guide completed <i>SI &amp; SBB Conservation Opportunities Strategy</i> (both may be completed before July 1, 2018).	SBWC, Communications & Invasive species staff	X	X	X	X	5%
3	Special Habitats	Manage WMSWCD's participation in the Clackanomah Oak Conservation Implementation Strategy. Do targeted landowner outreach and conservation planning with interested landowners. Develop specifications (and NRCS "Job Sheets") and assist landowner(s) and crews to implement conservation practices to specification. Develop contractor scopes of work. Coordinate, negotiate and collaborate with NRCS.	Conservation work begun at 1 Oak CIS site, according to specification. Outreach to ~50 target landowners. Begin planning with 1 additional landowner.	NRCS, CSWCD, Forest Conservationist	X	X	X	X	6%

2018-19 HEALTHY STREAMS ANNUAL WORKPLAN (OVERALL GOALS)									
GOAL	Program	STRATEGIES & ACTIONS	METRIC / OUTCOME	OTHER STAFF AND/OR PARTNERS INVOLVED	Q1 JULY, AUG, SEPT	Q2 OCT, NOV, DEC	Q3 JAN, FEB, MAR	Q4 APR, MAY, JUNE	% FTE
3	Special Habitats	Continue to support landowners, via the Healthy Habitats Program, with funding and technical assistance to protect, enhance and expand oak woodlands and savanna, meadow, native plant hedgerows, wetlands, ponds & other special habitats. Promote oak planting and / or understory seeding, planting and maintenance (and release for competing fir trees) via mailing, workshop or other outreach. Participate in regional efforts to promote the value of these habitat types, as time permits.	1-2 landowner plans / projects that enhance special habitats; ~4 well maintained and adaptively managed existing habitat projects; participation in or development of 1+ workshop or presentation; 1+ newsletter articles or social media posts on related topics		X	X	X	X	6%
1,2,3,4,5	Conservation Planning, Education & Outreach	Miscellaneous technical assistance to landowners & partners	timely and science-based information provided to interested parties upon request		X	X	X	X	6%
3, 5	Special Habitats/~Partner Funding/DEI	Work with Wisdom of the Elders at NARA site to do habitat restoration and engage the community; develop scope(s) of work and provide on-the-ground direction, as needed. Do conservation planning and coordinate with NARA staff.	1 Conservation plan for NARA site and well-defined contract and scope(s) of work ; successful restoration of ~1.5 ac. of targeted habitat area; residents engaged in at least one activity	Wisdom of the Elders, NARA	X	X	X	X	3%
1,2,3,4,5	All programs; Outreach	Support to other district programs; provide projects, learning opp's and mentorship to interns Participate in community workshops or events, e.g. presentation at Rural Living Field Day, Soil School, habitat workshop on Sauvie, volunteer field day, shift at Zoo conservation education center, as time permits	fellow tech. staff feel supported, 2 fulfilled interns; work 1-2 events	Forest Conservationist, Rural Conservationist, Communications / Outreach staff	X	X	X	X	3%
5	Outreach	Write articles for quarterly district e-newsletter, community and other publications, e.g. SRN, SICA; provide / develop misc. ed. & outreach / web content (e.g. Oak factsheets) and links; possibly participate in video development and shoot re: riparian, oak or other special habitat restoration, if time permits; take and share photos for use in articles, our website, Facebook Twitter, etc.	4+ articles; improved content of webpages on riparian and special habitats; compelling and timely photos for social media shared with communications staff	Communications/ Outreach staff, Office Manager re: video	X	X	X	X	2%
6	Professional Development/ All programs	Attend trainings/seminars/field visits and review literature to improve technical relevance to landowners and stay current with the latest in conservation science (e.g. wetlands, soils and erosion, water quality, farm conservation, new invasives, pollinator monitoring, restoration ecology)	Participation in 4 - 6 trainings / conferences / workshops; 4-6 brown bags, webinars or field days- e.g. CONNECT, UERC, CWMA Pull-Together, NRCS, OSU and partner organization trainings & field days, professional association conferences, etc.	Admin. Staff	X	X	X	X	6%
	Admin./All programs	Organize and / or attend relevant partner meetings to develop and maintain partner relationships and opportunities and stay current with conservation activities in the region and state, to support partner grants and pursue collaborative grants, to develop strategic focus, etc.	6 productive productive meetings and outcomes shared with fellow staff; match provided to partner groups, as appropriate		X	X	X	X	2%
	Admin.	Staff & Board meetings (Staff, Leadership Team, Tech Staff, Board)	active participation in bi-weekly, weekly and montly meetings; 2 board presentation	All staff, tech. staff, leadership staff	X	X	X	X	5%
6	Admin.	Monthly and quarterly reporting; annual report content and coordination; annual work planning and budgeting; may include some grant reporting	timely, complete and informative reports and plans	Admin. Staff; all staff; technician for mapping	X	X	X	X	6%
6	Admin.	Senior Conservationist Duites: organize tech. staff meetings, facilitate communication & coordination across tech. team	1-2 productive meetings/ month and sharing across programs; joint work products; satisfied and productive technician with thoughtful workplan and performance reviews		X	X	X	X	9%
TOTAL									85%



2018-19 Forest Conservationist ANNUAL WORKPLAN (OVERALL GOALS)										
GOAL	PROGRAM	STRATEGIES & ACTIONS	METRIC / OUTCOME	OTHER STAFF AND/OR PARTNERS INVOLVED	Q1 JULY, AUG, SEPT	Q2 OCT, NOV, DEC	Q3 JAN, FEB, MAR	Q4 APR, MAY, JUNE	TIMEFRAME	% ANNUAL TIME
Goals 1-5; Main goal: 4	Forest program	Provide landowners technical assistance, including stewardship plans, with science -based conservation and woodland management information.	Create 6 new stewardship/conservation plans.	Laura Taylor, Clean Water Services, Forest Park Conservancy	X	X	X	X	Ongoing	30
Goals 1-5; Main goal: 4	Forest program	Assist landowners with contracting vegetation crews and project management related to weed control as site preparation and site maintenance to enhance restoration projects. Create specifications for the work ahead of time. Development of relationships with youth crews	Complete these activities on 20 properties	Laura Taylor, Michelle Delepine, Ari DeMarco, Clean Water Services		X		X	Ongoing, heaviest in the fall	10
Goals 1-5; Main goal: 4	Forest program	Assist landowners with contracting vegetation crews and project management related to forest stand management. May include thinning, conifer release, gap creation, etc. Create specifications for the work ahead of time.	Complete these activities on 5 properties, about 25 acres	Laura Taylor		X			Late fall/early winter	10
Goals 1-5; Main goal: 3	Forest program	Plant ~13,000 native trees and shrubs to reduce erosion and add forest diversity/habitat on several properties	13,000 plants, 9 properties	Laura Taylor			X		February	10
Goal 6	Forest Program	Grant Administration. Oregon Department of Forestry/Western Competitive Grant, NRCS Conservation Innovation Grant, Beginning Farmer and Rancher grant with Northwest Natural Resources Group	meet deadlines for reports, timely reimbursement of expended funds	Randi Razalenti, Michele Levis, ODF, NRCS, Forest Park Conservancy, NNRG	X	X	X	X	Ongoing	5
Goals 1-6; Main Goal: 6	Internship	Manage intern program. Assure that interns are scheduled with staff for learning experiences and opportunities to assist with conservation planning and implementation. Problem solve with interns and staff to make sure the experience is good for all parties.	2 interns successfully complete internship; Each intern achieves most goals identified in their work plan.	Randi Razalenti, Jim Cathcart, Tech Staff	X			X	July-September	15
Goals 1-6; Main Goal: 6	Youth Mentoring	Work with high schools in Portland to hold field trips and service learning opportunities at WMSWCD project sites in an effort to educate youth about the environmental restoration field	Support 3 field trips to project sites with classes from 1-2 schools in Portland	OSU Extension 4-H, local schools	X	X	X	X	Ongoing	5
Goals 5-6; Main Goal: 6	Diversity, Equity, and Inclusion	Participate in the DEI committee; work on special projects including development of a mentorship program for younger environmental professionals	Creation or significant progress towards a DEI Mentorship Program, attendance at all or most committee meetings.	DEI Committee, Nonprofit Association of Oregon, Intertwine	X	X	X	X	Ongoing	5
Goals 5-6; Main Goal: 5	Education and Outreach	Contact/educate landowners through mailings, newsletter articles, and web content. Teach at workshops such as Tree School and other local or regional events	6 articles for various newsletters; participate in 1-2 workshops; develop web content	Carolyn Lindberg, OSU Extension, Northwest Natural Resources Group	X	X	X	X	Ongoing	5
Goal 6	Education/Forest Program	Attend trainings to broaden education and experience related for forestry and other natural resources topics	Attend 1-2 pertinent trainings, workshops, and/or conferences	various partner organizations	X	X	X	X	Ongoing	5
										100

2018-19 INVASIVE SPECIES PROGRAM COORDINATOR ANNUAL WORKPLAN (OVERALL GOALS)					TIMEFRAME				
GOAL (narrow down to priority goals)	PROGRAM	STRATEGIES & ACTIONS	METRIC / OUTCOME	OTHER STAFF AND/OR PARTNERS INVOLVED	Q1 JULY, AUG, SEPT	Q2 OCT, NOV, DEC	Q3 JAN, FEB, MAR	Q4 APR, MAY, JUNE	% ANNUAL TIME
Goals 1 - 3 (goals 4-5 are supported, but secondary focus)	Early Detection, Rapid Response	Detect, document and control invasive species on the District's EDRR list through landowner outreach, surveying, mapping, data collecting, controlling (via established integrated pest management (IPM) principles), and monitoring.	Outreach to 100 new property owners to increase survey area, inventory 450 properties each year and treat all permitted properties with infestations (approximately 400).	Conservation Tech, Interns, Admin staff, Communication/Outreach, BES, CWS, PP&R, 4C-CWMA, TCWC, JCWC, SRN	X	X	X	X	45
Goals 1-3, 5	EDRR Restoration	Work with property owners of early detection, rapid response sites to develop conservation plans and implement restoration practices.	Actively manage 6 projects; recruit 2 new projects.	All technical staff, as needed (<1%)	X	X	X	X	15
Goals 1-3, 5	Riverview Canopy Weeds Program	Outreach to landowners to provide control of canopy vines.	Expand project scope to include an additional 25 priority properties.	Communications/Outreach		X	X	X	2
Goal 5	Education & Outreach	Provide one-time technical assistance for a host of habitat and ecosystem function concerns via phone, email and other communications.	Provide assistance to 75 landowners, residents & community members.	All technical staff, as needed (<1%)	X	X	X	X	5
Goal 5	Education & Outreach	Develop and lead Weed Watcher program. Partner with community groups to host invasive species demos at native plant sales. Present at community organization meetings. Assist with Backyard Habitat invasives training. Table at the Zoo Education Center.	Organize 1 weed watcher workshop. Participate in 5 native plant sales. Present at community meetings as needed. Lead one Backyard Habitat training. Table at least once at the Zoo Education Center.	Communications/Outreach, Conservation Tech, Interns, SWNI, TCWC, Friends of TC, CWS, TSWCD, 4C-CWMA, SRN, SBWC, Audubon, BHCP, Zoo	X	X	X	X	2
Goal 5	Education & Outreach	Contribute to, and develop, printed content for communications and outreach.	Submit quarterly newsletter articles, and contribute to annual report. Develop and distribute EDRR annual report.	Communications/Outreach, CWMA	X	X	X	X	3
Goals 1-3, 5	Integrated Pest Management	Be source of integrated pest management information to support District invasive species management activities. Work with partners to develop IPM resources, such as solvepestproblems.edu website†.	Develop 2 seasonal contractor check-ins. Track NPDES documenting and reporting requirements. Provide new best management practice information as it becomes available and respond to requests from staff and community.	CWMA, All technical staff (>1%)	X	X	X	X	5
Goals 1-3	4-County Cooperative Weed Management Area†	Serve as the co-chair through June 2019. Lead the Steering Committee and participate on the Mapping & Data Committee, Education & Outreach Committee, and Technical & Scientific Review Committees.	Provide guidance to the Coordinator, Annual Work Plans, and all CWMA activities. Host one general meeting, participate in two general meetings, plan Pull Together event, and participate in all activities.	4C-CWMA, BES, EMSWCD, CSWCD, Clark Noxious Weed Control Board, TSWCD	X	X	X	X	10

2018-19 INVASIVE SPECIES PROGRAM COORDINATOR ANNUAL WORKPLAN (OVERALL GOALS)					TIMEFRAME				1
GOAL (narrow down to priority goals)	PROGRAM	STRATEGIES & ACTIONS	METRIC / OUTCOME	OTHER STAFF AND/OR PARTNERS INVOLVED	Q1 JULY, AUG, SEPT	Q2 OCT, NOV, DEC	Q3 JAN, FEB, MAR	Q4 APR, MAY, JUNE	% ANNUAL TIME
Goals 1-3	Tryon Creek Watershed Council	Work with Watershed Council to manage, control and map priority weeds in the watershed. Participate in TCWC Stewardship meetings, events etc.	Participate in 4 TCWC Stewardship Meetings and 1 TCWC event. Assist with PSU weeds mapping project.	TCWC	X	X	X	X	3
Goal 6	iMap Invasives †	Participate in annual mapping updates, and provide feedback to improve platform.	Submit mapping data once annually.	iMap Invasives, PSU			X		1
Goals 5-6	Oregon Invasive Species Council	Serve on the OISC and participate in the Education & Outreach and Legislative committees. Represent local weed management organizations and act as a liaison to these groups.	Participate in 4 quarterly meetings and 4 committee meetings. Present 4 updates to 4-County CWMA, and at least one outside CWMA.	OISC, ODA, DEQ, ODF, USFS, BLM, Oregon Marine Board, ODFW, Oregon Sea Grant, PSU, USDA-APHIS, etc.	X	X	X	X	2
Goals 1-3, 6	Pacific Northwest Garlic Mustard Working Group	Lead the PNW-Garlic Mustard Working Group in collaborations and communications.	Organize and facilitate one meeting (annually). Co-curate the list-serv. Develop materials such as minutes, IPM matrices, and poster presentations, when necessary.	King County Noxious Weed Control Board, CWMA partners (listed above), Western Invasives Network, Yamhill SWCD, WSDA, ODA, BC Ministry of Forests, etc.		X	X		1
Goal 1	Willamette Aquatic Invasives Network	Partner with WAIN on aquatic invasive species initiatives, communications and other projects.	Participate in 2 meetings annually. Organizational support when needed.	Willamette Riverkeepers, Western Invasives Network, Benton SWCD, etc.		X	X		1
Goals 1-6	Support to other Staff	Lend assistance to other staff to duties beyond those described above.	Participate in staff & tech staff meetings; act as District Safety Officer; Demonstration gardens; invasive ID; vehicle maintenance; administrative assistance review and tracking etc.	WMSWCD staff	X	X	X	X	5
† indicates recommended funding recipient									100

2018-19 FISCAL ADMINISTRATION ANNUAL WORKPLAN (OVERALL GOALS)					TIME PERIOD				% ANNUAL TIME	
GOAL	PROGRAM AREA	STRATEGIES & ACTIONS	METRIC / OUTCOME	OTHER STAFF AND/OR PARTNERS INVOLVED	Q1 JULY, AUG, SEPT	Q2 OCT, NOV, DEC	Q3 JAN, FEB, MAR	Q4 APR, MAY, JUNE	CONTROLLER	OFFICE MANAGER
6	Accounting and Finance	Manage and/or support all monthly accounting to maximize efficiency and effectiveness; includes accounts payable, accounts receivable, payroll, banking, tax filings, financial statements and budget vs. actual reporting	Financial records are in order and finances are managed in accordance with policies and are in compliance with all laws and regulations; all items available in time for processing and vendors paid on-time	All Staff; Vendors	X	X	X	X	20%	10%
6	Audit	Complete annual audit	Audit reflects "clean" opinion and financial statements present financial position of governmental activities in accordance with generally accepted accounting principles without exception	Auditor	X	X			12%	
6	Board Support	Support board as needed and attend all board meetings (minutes, public meeting announcements, board package, etc.)	All Board files updated and accurate with agenda, minutes, staff reports, resolutions, postings, notices, etc.	Board; District Manager; Admin staff	X	X	X	X	1%	16%
6	Budget	Develop and file the annual budget	All local, state and federal standards and laws met; staff, board and public participate	All Staff; TSCC			X	X	24.5%	
5	Communications	Assist Communications (newsletter articles, annual meeting & report prep, tabling, zoo education, website support, etc.)	Financial updates prepared for 2 Newsletters per year and for Annual report; website is up-to-date with public meeting announcements, financial information and other administrative compliance information	Communications	X	X	X	X	1%	
6	Communications	Continue committee work with contracted historian videographer to document history of district for 75th Anniversary celebration at Annual Meeting in fall 2019	Contracted historian is supported in efforts to produce a video documenting WMSWCD history	Communications; contracted videographer		X	X	X		1%
5	Communications	Videos: shoot & edit conservation program videos for District website	Internal videos posted to District YouTube/website	Communications; tech staff	X	X	X	X		3%
6	DEI	Support Diversity, Equity, and Inclusion (DEI) Committee as needed and attend all meetings (minutes, SharePoint site management, public meeting announcements, scheduling, follow-up tasks, etc.)	DEI Committee functions optimally and is well supported	All Staff and DEI committee	X	X	X	X		3%
6	Grants	Quarterly reporting; compiling documentation and support; monitoring requirements; budget tracking, gathering approvals and filing	Grant reporting current; management and filing kept up-to-date in accordance with agreements	Applicable Staff and Grantor entities	X	X	X	X	3%	5%
6	Human Resources	Recruitment, hiring, Employee Handbook changes; timesheet gathering/pre-approval; expense report pre-approval; assistance with benefits, new hire paperwork, timesheet submittal, etc.	In compliance with all labor laws and regulations	All Staff	X	X	X	X	1%	3%
6	Human Resources	Safety: Emergency binder kept up-to-date; OSHA binder kept up-to-date; attend trainings as needed; safety sub committee annual evaluation; Fire warden; bulletin board postings	In compliance with OSHA	All Staff	X	X	X	X		2%
6	Human Resources	Assist with ensuring all Staff and Directors are receiving professional training and attending seminars/workshops applicable to their areas of responsibility	Training adequate for SDAO Best Practices discount	All Staff; Board	X	X	X	X		1%

2018-19 FISCAL ADMINISTRATION ANNUAL WORKPLAN (OVERALL GOALS)					TIME PERIOD				% ANNUAL TIME	
GOAL	PROGRAM AREA	STRATEGIES & ACTIONS	METRIC / OUTCOME	OTHER STAFF AND/OR PARTNERS INVOLVED	Q1 JULY, AUG, SEPT	Q2 OCT, NOV, DEC	Q3 JAN, FEB, MAR	Q4 APR, MAY, JUNE	CONTROLLER	OFFICE MANAGER
6	Office Management	Ensure all areas related to office operating smoothly (including computer and all office equipment, systems, files, reception duties, mail distribution, admin, scheduling, etc. ) are all in order and functionaing optimally	Everything working and all documents are up-to-date and can be located	All Staff	X	X	X	X		25.0%
6	Office Management	Maintain all district files and archives, both paper and electronic, to ensure compliance with ODA SWCD and SDAO requirements (record retention laws, statutory laws, and administrative rules)	District in compliance with records managmeent rules for public agencies	Admin Staff, District Manager	X	X	X	X	1%	5%
6	Office Management	Support and/or lead planning for internal staff events (staff meetings, minutes, refreshments, celebrations, etc.)	District is a great place to work	Admin Staff	X	X	X	X		2%
6	Office Management	Office space improvements: display cases; Storage space improvements: continue organizing and labeling	Optimal work environment	All Staff	X	X	X	X		1%
1-5	Operations Support	Support all staff as needed with admin aspects of their work (examples include tracking landowner cost-share contributions, tracking match-time related grants, producing and sending grant close-out letters, documenting NPDES treatment, conference and workshop registration and travel arrangements)	Staff feel supported	All Staff	X	X	X	X		8%
1-5	Operations Support	Manage District's Vehicles & potential DAS rentals (mileage logs, servicing, repairs, etc.)	Vehicles are optimally maintained and meet the needs of staff	Tech Staff	X	X	X	X		1%
6	Public Contracting and Procurement	Support all staff as needed with contracting issues, facilitating contract processing, gathering of supporting documentation, providing guidance	Contracting Guidance will be a value added resource for staff when working with contractors; all contractor files are up-to-date, and maintained in compliance with all contract requirements	All Staff	X	X	X	X	3%	3%
6	Supervision	Guide and supervise work of Office Manager and Admin Asst.	Postion Descriptions, Professional Development Plans, Annual Work Plans and Annual Performance Reviews are completed and up-to-date; supervised employees are given direction and are supported	All Staff	X	X	X	X	3%	
6	Tasks Applicable to all Staff	Cyclical Admin tasks (time sheets, health plan enrollment, employee handbook review, annual work plan, LRBP updateae as necessary)	Time sheets and health plan enrollment submitted on time 1 annual work plan developed	Admin Staff, District Manager	X	X	X	X	3%	3%
6	Tasks Applicable to all Staff	Attend Trainings (including DEI) and Conferences in accordance with Professinal Development Plan	Annual continuing education requirements to keep licenses active are completed; workshop and training relevant to work are attended as necessary	Training Organizations	X	X	X	X	5%	5%
6	Tasks Applicable to all Staff	Attend meetings (Staff, Board, Annual, Leadership, etc.)	Productive staff and Board collaboration	Staff, Board of Directors	X	X	X	X	2.5%	2.5%
FTE									80%	100%

## Appendix F: Priority Animal Species of our Foodshed, Watershed and Woodshed

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The District endeavors to restore habitats that benefit federal and state listed species, including state “sensitive” species, and other declining species, as determined by Oregon Department of Fish & Wildlife, US Fish and Wildlife Service, National Marine Fisheries Service and other national or regional wildlife authorities, such as Audubon Society, The Xerces Society for Invertebrate Conservation, etc. The following is a list of just some of the species we hope to benefit from our restoration work.

- Acorn woodpecker
- Band-tailed pigeon
- Bat (various species)
- Bald Eagle
- Chinook, coho, steelhead, and other salmonids
- Coastal cutthroat trout
- Columbia White-tailed Deer
- Common nighthawk
- Common yellowthroat
- Douglas squirrel
- Dusky Canada goose
- Lamprey species
- Lewis’s woodpecker
- Mink
- Northern oriole
- Oregon vesper sparrow
- Osprey
- Pileated woodpecker
- Purple martin
- Red-legged frog
- Sandhill crane
- Slender-billed nuthatch
- Short-eared owl
- Spotted sandpiper
- Streaked horned lark
- Varied thrush
- Western blue bird
- Western bumblebee
- Western gray squirrel
- Western meadowlark
- Western painted turtle
- Western pond turtle (various species)
- Western toad
- White sturgeon
- Willow flycatcher
- Yellow-billed cuckoo
- Yellow-breasted chat

## Appendix G: Anticipating and Adapting to Climate Change

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The District considers climate change in its conservation planning, long-range plans and other activities. As described in the Oregon Climate Assessment Report (<http://occri.net/ocar>) and other scientific sources, habitats and wildlife populations are sensitive to climatic conditions, namely precipitation and temperature. Observed 20<sup>th</sup> century and future anticipated impacts include increased temperatures; stream flows that are higher in winter, lower in summer, and peak earlier in spring; the timing of bird migration, plant bud break, and insect life cycles; and vulnerability to other stressors such as more aggressive or new invasive species and pathogens.

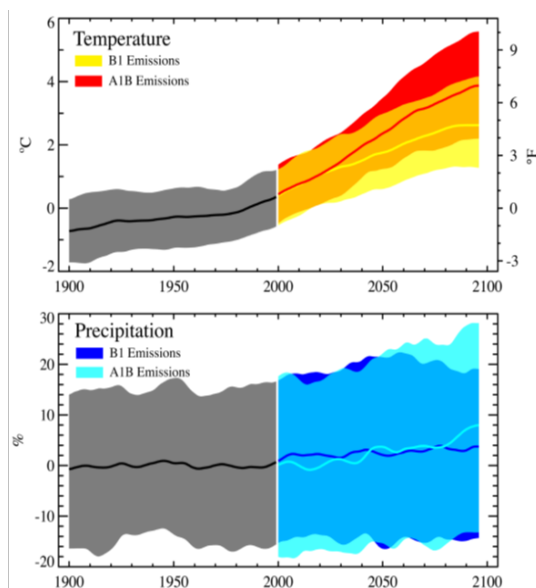
The region’s changing climate highlights the importance of the District's efforts to create healthy and resilient ecosystems, including enhanced upland and riparian forest, floodplains, wet meadow, marsh and other wetland and aquatic habitats. These improved ecosystems provide flood relief and habitat for salmon and other wildlife. Certain ecosystems, such as Oregon white oak habitat, may fare better than

others and, therefore, get increasing attention from the District. The potential for increased forest fire risk in the Pacific Northwest will increase the importance of creating healthy forests in the District. Increasingly high flows and arid summers call for greater attention to erosion control on slopes and in farm fields. The inclusion of a diversity of species in our habitat restoration projects, including those adapted to a warmer climate, will improve our chances of success.

The District will work with agricultural producers to become more resilient to climate change and its effects on crop production, water usage, rotations, species selection, soil management, and pest control. The District will also work with woodland owners to manage healthy and diverse forests that store carbon to slow climate change as well as build resiliency to the deleterious effects of warmer temperatures, altered hydrologic regimes, and increased insect, pathogen and invasive species pressure.

The District will track knowledge of regional and local climate-related trends to assess the need for adaptation of the District's conservation programming and projects. Relevant research findings include the Willamette Valley vulnerability assessment, anticipated updates to the Oregon Conservation Strategy – for the Willamette Valley – by the Oregon Department of Fish and Wildlife, The Nature Conservancy's upcoming revision to the Willamette Valley Conservation Opportunities Map, and the (Portland Metro area) Intertwine regional assessment of biodiversity and wildlife corridor analysis.

**Figure 1. Historic and projected temperature change (top panel) and percent precipitation change (bottom panel) in the Pacific Northwest from 20th and 21st century global climate model simulations.**



The black curve for each panel is the weighted average of all models during the 20th century. The colored curves are the weighted average of all models in that emissions scenario ("low" or B1, and "medium" or A1B) for the 21 century. The colored areas indicate the range (5th to 95th percentile) for each year in the 21st century. All changes are relative to 1970-1999 averages.

Credit: Mote and Salathé, 2009 and 2010:

Mote, P.W., Salathé E.P. 2010. Future climate in the Pacific Northwest. *Climatic Change* 102(1-2): 29-50, doi: 10.1007/s10584-010-9848-z

Mote, P.W. Salathé, E.P. 2009. *Future Climate in the Pacific Northwest*. Chapter 1 in: *The Washington Climate Change Impacts Assessment*. [Littell, J., M. M. Elsner, L. W. Binder, A. Snover (eds)]. Climate Impacts Group, University of Washington, Seattle, WA.