



**WEST MULTNOMAH**  
Soil & Water Conservation District

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Proposed Budget Fiscal Year 2022-2023

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Portland, Oregon

*Working Lands Conservation,  
Clean Water, Healthy Soil, Diverse Habitat*

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GOVERNMENT FINANCE OFFICERS ASSOCIATION

*Distinguished  
Budget Presentation  
Award*

PRESENTED TO

**West Multnomah Soil & Water Conservation District  
Oregon**

For the Fiscal Year Beginning

**July 1, 2021**

*Christopher P. Morill*

Executive Director

Government Finance Officers Association of the United States and Canada (GFOA) presented a Distinguished Budget Presentation Award to **West Multnomah Soil & Water Conservation District, Oregon**, for its Annual Budget for the fiscal year beginning **July 1, 2021**. In order to receive this award, a governmental unit must publish a budget document that meets program criteria as a policy document, as a financial plan, as an operations guide, and as a communications device. This award is valid for a period of one year only. We believe our current budget continues to conform to program requirements, and we are submitting it to GFOA to determine its eligibility for another award.

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The mission of West Multnomah Soil & Water Conservation District (District) is to provide resources, information, and expertise to inspire people to actively improve air and water quality, fish and wildlife habitat, and soil health.

The District does not discriminate based on any class or identity including age, color, disability, gender identity or expression, genetic information, marital status, national origin, race, religion, sex, sexual orientation, and veteran status. The District is an equal opportunity employer and service provider. The District makes reasonable accommodations for persons with disabilities and special needs to provide access to District events, materials, and services.

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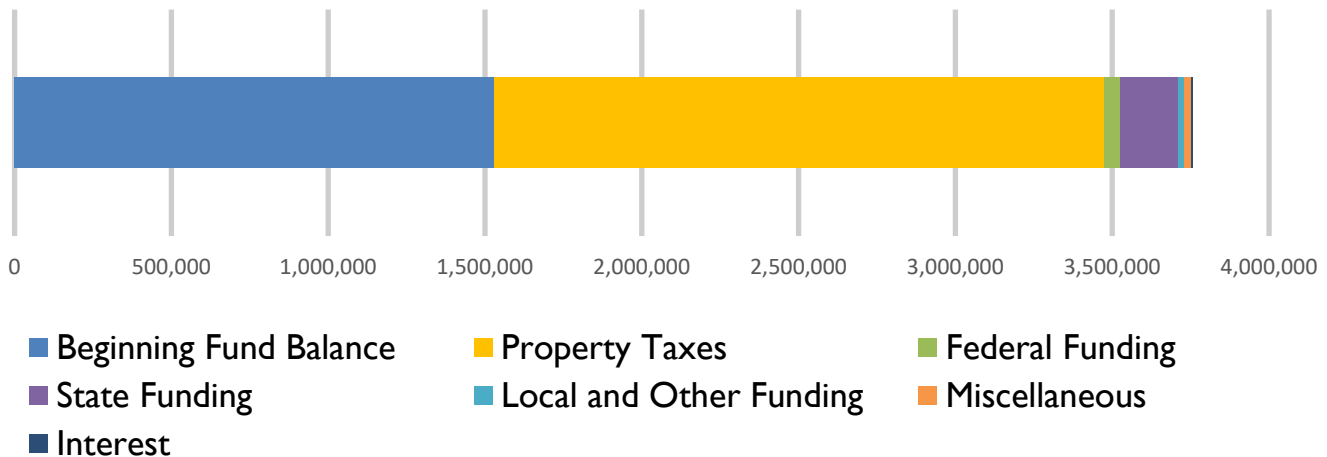
# SECTION I: BUDGET MESSAGE

This budget message explains the West Multnomah Soil & Water Conservation District (District) budget for July 1, 2022, through June 30, 2023 (Fiscal Year (FY) 23). The budget is in compliance with 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. The budget is a one-year financial reflection of the District’s short-term and long-term planning processes. It supports implementation of the District’s annual work plans and programs for FY23 and is consistent with the District’s mission, vision, and guiding values and principles as discussed in [Section 2: The District](#). The annual budget compared to historical results is in [Section 4: Financial Summaries](#), where our [Five-year Financial Forecast](#) can also be found.

## Budget Overview Resources

In FY23, our overall general fund resources are budgeted to be \$3,758,365, an increase of \$451,282, primarily due to a higher beginning fund balance and higher property tax revenues compared to the prior year.

### FY23 Fiscal Year General Fund Resources (\$3,758,365)



Type	FY 22	FY 23	Comparison of FY23 to FY22	
			Increase / (Decrease)	%
Beginning Fund Balance	1,286,000	<b>1,528,000</b>	242,000	19
Property Taxes	1,755,934	<b>1,947,093</b>	191,159	11
Federal Funding	48,750	<b>50,000</b>	1,250	3
State Funding	151,009	<b>184,557</b>	33,548	22
Local and Other Funding	30,000	<b>20,000</b>	(10,000)	(33)
Miscellaneous	27,890	<b>23,215</b>	(4,675)	(17)
Interest	7,500	<b>5,500</b>	(2,000)	(27)
<b>Total</b>	<b>3,307,083</b>	<b>3,758,365</b>	<b>451,282</b>	<b>14</b>

Our beginning fund balance of \$1,528,000, representing 41% of total resources, is \$242,000 or 19% higher than the prior year due to projected underspending of \$153,000 in FY22. This underspending is primarily due to an open position that was budgeted for but not filled in FY22 (the Education and Community Garden Conservationist position) and to postponement of the website redesign and other communications project. The beginning fund balance is calculated by taking current cash balances and adding projected revenue and subtracting estimated spending from the current date through 6/30/22.

The other significant resource for the District, representing 52% of our total resources, is the permanent property tax levy, which is set at a maximum rate of 7.5 cents per \$1,000 of assessed value. After the taxes extended amount is reduced for estimated [Measure 5](#) tax revenue compression and a presumed discount and delinquency rate of 6.5% (based on the current year’s collection rate), the property taxes estimated to be received are \$1,912,000. Measure 5 tax revenue [compression](#) occurs when a property's tax bill must be reduced ("compressed") to fall within constitutional limits totaling \$15 per \$1,000 of a property's real market value. Effectively, all the property tax supported districts and entities that receive a portion of the property tax revenue pie must share the compression loss and each gets a smaller portion of the pie.

All assumptions are in a range consistent with the current and prior years. Our projection is also conservative and within forecasts provided by Multnomah County’s Tax Supervising & Conservation Commission (TSCC). Added to property taxes levied in FY23 are property tax revenues of \$35,093 that were levied in earlier years, but which are expected to be received only in FY23. The total of these two amounts is \$1,947,093, representing an 11% increase compared to FY22 budget of \$1,755,934 and a 4.5% increase compared to FY22 expected actuals of \$1,863,000. The following table reflects the actual assessed value over the last four years and the projection for FY23 based on assumption of assessed value increases by county, compression, and collection rate, all marked in red.

Permanent Rate Levy of 7.5 cents / \$1,000 assessed value

Assessed Value (AV)	Fiscal Year Actual								FY23 Projection	
	2019		2020		2021		2022		Budgeted Increase	Estimated Amount
Multnomah	22,503,506,240	1.6%	23,911,405,777	6.3%	24,769,012,213	3.6%	27,378,082,352	10.5%	4.0%	28,473,205,000
Washington	43,550,310	80.9%	73,951,986	69.8%	111,648,203	51.0%	147,304,428	31.9%	20.0%	176,765,000
Columbia	9,843,761	3.8%	10,329,212	4.9%	10,888,452	5.4%	10,885,748	0.0%	5.0%	11,430,000
<b>Total All Counties</b>	<b>22,556,900,311</b>		<b>23,995,686,975</b>		<b>24,891,548,868</b>		<b>27,536,272,528</b>			<b>28,661,400,000</b>

Taxes Extended (TE)	Fiscal Year Actual								FY23 Projection	
	2019		2020		2021		2022		Rate	Amount (Est AV x Rate)
Multnomah	1,695,917	1.9%	1,796,853	6.0%	1,861,166	3.6%	2,053,000	10.3%	\$ 0.0750	2,135,000
Washington	3,266	81.0%	5,547	69.8%	8,374	51.0%	11,000	31.4%	\$ 0.0750	13,000
Columbia	738	3.8%	775	4.9%	817	5.4%	0		\$ 0.0750	0
<b>Total All Counties</b>	<b>1,699,922</b>		<b>1,803,174</b>		<b>1,870,357</b>		<b>2,064,000</b>			<b>2,148,000</b>

Compression <sup>1</sup>	Fiscal Year Actual								FY23 Projection	
	2019		2020		2021		2022		Selected % of TE	Amount
Multnomah	69,525	4.1%	82,447	4.6%	97,738	5.3%	98,718	4.8%	4.8%	102,500
<b>Total All Counties</b>	<b>69,525</b>		<b>82,447</b>		<b>97,738</b>		<b>98,718</b>			<b>102,500</b>

ACTUAL/EST. TAXES IMPOSED:	1,630,397	1,716,263	1,765,316	1,965,282	2,045,500
Collection Rate:	96.0%	95.3%	94.0%	93.5%	93.5%
ACTUAL/EST. TAX RECEIPTS:	1,565,635	1,635,943	1,689,351	1,837,000	1,912,000
ACTUAL/EST. PY TAX RECEIPTS	49,619	21,557	23,378	26,000	35,093
	1,615,254	1,657,500	1,712,729	1,863,000	1,947,093

Interest income earned on our Oregon State Treasury's Local Government Investment Pool (LGIP) funds is budgeted at \$5,500, a decrease from prior years, reflecting the continuing lowering of interest rates paid on our funds in Oregon's Local Investment Pool. The average annualized yield was most recently .45% through 3/15/2022, and it was increased to .55% on 3/16/2022. All public funds in Oregon must be deposited in compliance with the requirements of Oregon Revised statutes ([ORS](#) [chapter 295](#)). Public officials may deposit public funds up to the amount insured by the Federal Deposit Insurance Corporation (FDIC) or National Credit Union Administration (NCUA), currently \$250,000, in any insured financial institution with a head office or branch located in Oregon. Public funds balances that exceed those insurance limits, however, must be held at a depository qualified under [Treasury's Public Funds Collateralization Program \(PFCP\)](#). Through the PFCP, depositories pledge collateral to secure any public funds deposits that exceed insurance amounts, providing additional protection for public funds in the event of a depository loss or failure, creating a shared liability structure for participating depositories, minimizing (though not eliminating) the risk of loss of such funds.

Other resources include grant funding and cooperative agreements as well as contributions received from partners for shared projects. These funding sources are detailed in the following table. Note that not all of the following resources have been secured. The FY23 budget has identified those expenditures that are conditioned on receiving these additional grant resources; should the additional resource not be obtained, those corresponding expenditures will not be authorized as part of the fiscal oversight of the budget. Only the first two grants highlighted in the table (NACD Technical Assistance and ODA TALMA) are secured and support staff labor and projects already in place.



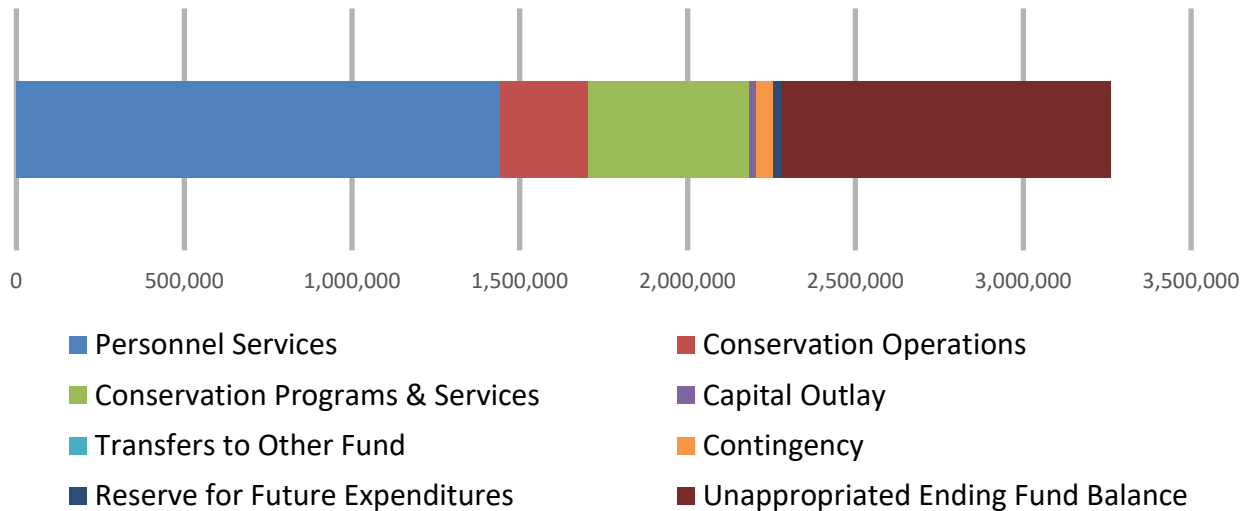
GRANTS AND OTHER RESOURCES		FY22	FY23	Increase/ (Decrease)	%	Funding Description
<b>Federal</b>	NRCS & NACD Partnership <sup>1</sup>	48,750	50,000	1,250	3	NACD Technical Assistance Grant to expand NRCS rural conservation capacity in forestry, agricultural and habitat restoration programs.
<b>State</b>	ODA TALMA Rural <sup>1</sup>	87,902	87,905	3	0	Capacity funding for District Water Quality Compliance Program requirements for the Oregon Dept. of Agriculture in the Lower Willamette, North Coast and Tualatin basins.
	OWEB Rural Special Habitats	13,000	41,719	28,719	221	Various project-specific OWEB local grants to fund project implementation in oak habitat restoration as well as other riparian and upland native habitat restoration projects.
	OSWB Invasive Species	35,747	38,000	2,253	6	Funding for Early Detection and Early Response (EDRR) noxious weed control; primarily garlic mustard. Pass through money to EDRR partners.
	OSWB Invasive Species	-	27,433	27,433	new	Willamette Confluence & Sauvie Island Aquatic Weed Control Grant.
	Other State Small Grants	2,000	6,000	4,000	200	Included Oregon Invasive Species Council grant in FY22; In FY23 represents small grant funding available for Educational projects.
	OWEB Forestry	12,360	3,500	(8,860)	(72)	OWEB local grant for blackberry control and mid-stand release treatments in upper McCarthy Creek headwaters.
	Sub-total	151,009	204,557	53,548	35	
	<b>Local</b>	CREST	30,000	-	(30,000)	0
<b>Other</b>	PP&R, BES, workshops attendees, misc.	27,890	23,215	(4,675)	(17)	Projected partner contributions to WWRP and registration fees for workshops and training provided by the District.
<b>Total</b>		<b>\$257,649</b>	<b>\$277,772</b>	<b>\$20,123</b>	<b>8</b>	

**Note 1:** This grant funding is secure and supports staff labor and projects already in place.

## Budget Overview Expenditures

Our General Fund requirements are summarized in the following table. The [details of each category](#) follow the discussion of [Priorities and Issues Guiding the Development of the Budget](#).

### 2023 Fiscal Year General Fund Requirements (\$3,758,365)



Type	FY 22	FY 23	Comparison of FY23 to FY22	
			Increase / (Decrease)	%
Personnel Services	1,443,268	1,634,504	191,237	13
Conservation Operations	306,204	375,728	69,524	23
Conservation Programs & Services	491,100	549,223	58,123	12
Capital Outlay	18,650	40,000	21,350	114
Contingency	50,000	50,000	-	0
Reserve for Future Expenditures	25,000	25,000	-	0
Unappropriated Ending Fund Balance	972,861	1,083,910	111,048	11
<b>Total</b>	<b>3,307,083</b>	<b>3,758,365</b>	<b>451,282</b>	<b>14</b>

## **Priorities and Issues Guiding the Budget Development**

Although our priorities always focus on working lands conservation, healthy soil, clean water, and diverse habitat, each year has issues or challenges that we tackle with new initiatives or special attention. The principal issues facing the District as we close out FY22 and plan for FY23 are emerging successfully from over two years of remote work due to the COVID-19 pandemic, ramping our conservation work back up to pre-pandemic levels with full-staffing, transitioning to both a new office space and a new hybrid model of work, and managing the effect of rising inflation on personnel costs and other materials and services. In addition to these new issues, we continue to work on equitable and inclusive practices internally and throughout our service area and on successfully implementing our long-range business plan.

Our budget recognizes these priorities in multiple ways. We're hiring a new field conservationist, a position that has been open throughout FY22. We're dedicating staff time and \$75,000 in budget dollars to ensuring the transition to new office space and the associated infrastructure buildout is efficient and smooth. We're working with our board and staff to reimagine work, taking advantage of technology upgrades and our learnings over the last two years to develop a plan forward and a hybrid work model. We're managing rising inflation to ensure it does not outpace our growing property tax revenue and expanding grants.

## General Fund Requirements ([Form LB-30](#))

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

Category	FY22	FY23	Increase/ (Decrease)	%	Reason for Change
<b>Personnel services</b>	1,443,267	1,634,504	191,237	13	Primarily due to increased COLA, salary step, and benefits, and .5 FTE increase in conservation staff
<b>Materials &amp; services: Administrative Operations</b>	306,204	375,728	69,524	23	Increase due to relocation to new office and storage space (moving, infrastructure buildout, rent overlap), partially offset by decrease in printing of Meadowsclaping books
<b>Materials &amp; services: Conservation Programs</b>	491,100	549,223	58,123	12	Primarily due to an increase in grant-supported conservation work; see details below
<b>Capital outlay</b>	18,650	40,000	21,350	114	Increase due to grant supported aquatic weed survey boat and replacement vehicle
<b>Contingency</b>	50,000	50,000	-	-	Amount consistent with prior years and considered prudent
<b>Reserve for future expenditures</b>	25,000	25,000	-	-	Set aside funds for economic stabilization reserve and to save for future opportunities; balance at 6/30/23 will be \$125,000
<b>Unappropriated ending fund balance</b>	972,861	1,083,910	111,048	11	Represents required funds to cover the District's cash flow needs for spending in fall prior to receipt of tax revenues; increase reflects higher monthly cash flow needs due to inflation, increase in reserve for future expenditures, and increase due to inclusion of funds assigned to Stewardship Fund
<b>Total</b>	<b>3,307,082</b>	<b>3,758,365</b>	<b>451,282</b>	<b>14</b>	

## **Personnel Services**

Our staffing, shown in the chart below and in our [organizational chart in Appendix B](#), has been stable over the last five years. Our FY23 full-time equivalent (FTE) staff of 11.3 reflects a .5 FTE increase. This is due to a .75 and a .9 FTE position both increasing to 1.0 and a .67 FTE position increasing to .85 FTE. These increases in conservation staff were partially offset by a .1 decrease in administrative staff due to the temporary intern position of 250 hours in FY22 to assist with developing a business continuity plan not repeating. The FY23 staffing assumes a currently open position, Field Conservationist (previously a position titled Education and Community Garden Conservationist), is filled by fall 2022.

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

<b>Category</b>	<b>FY 19</b>	<b>FY 20</b>	<b>FY 21</b>	<b>FY 22</b>	<b>FY 23</b>
<b>Administrative staff, including communications</b>	3.4	3.4	3.6	3.8	3.7
<b>Conservation staff, including seasonal workers</b>	7.4	7.9	7.2	7.0	7.6
<b>Total</b>	<b>10.8</b>	<b>11.3</b>	<b>10.8</b>	<b>10.8</b>	<b>11.3</b>

The majority (7.6 FTE) of the District’s budgeted FY23 employees provide direct conservation services as outlined in Section 2. Two conservation interns assist staff annually with planting and weed eradication fieldwork in the spring and fall and with Geographic Information System (GIS) data, database management, and technical analyses during the summer. The remaining staff (3.7 FTE) provide financial, human resources, and administrative services to support the conservationists and their programs, and communication and outreach services to reach constituents who benefit from District conservation technical assistance and educational opportunities.

All work occurs under the direction of the District Manager, who reports to the Board of Directors and supports the District’s conservation mission by working directly with our partners, including local, regional, state, and federal government agencies, non-profits, community groups, elected officials, and private businesses and citizens, to achieve the goals and initiatives of the District. In particular, the District Manager has been instrumental in overall program management for large scale projects (e.g., the multi-year Sturgeon Lake Restoration Project) and initiatives (e.g., diversity, equity and inclusion, and long-range business planning).

### *Analysis of changes in personnel services*

The total personnel services of \$1,634,504 includes salaries and wages of \$1,110,298, health insurance of \$170,781, PERS retirement plan contributions of \$240,245, and payroll taxes of \$113,180. The change in each of these components is discussed below.

### *Salaries and Wages of \$1,110,298:*

Since FY22, the District has used a merit-based salary scale step system for each position. This compensation framework allows us to better manage our personnel costs and better forecast future costs. By defining the compensation from entry level to the most senior level for each position classification, employees can experience upward movement in salary until they reach the top rate of

pay for their position. Once at the top rate of pay, any increase will be dependent on the cost of living adjustment (COLA). The basis for determining COLA is the Bureau of Labor Statistics' published Consumer Price Index (CPI) for Urban Wage Earners and Clerical Workers in the West, size class A, (CPI-W), which is 7.9% for the last 12-month period. In FY23, five employees will have newly reached the top rate of pay for their position. Over the next two years, two more employees will reach the top rate of pay for their position. This means that future merit-based increases are forecasted to be moderate (from zero to a maximum of 2.5% for any individual employee) prior to the COLA adjustment. The net resulting change from the FY22 budget of \$970,996 is an increase of \$139,303, or 14%. Of this change 9% is due to salary and wage increases for existing employees and 5% is due to the additional .5 FTE headcount in the conservation area.

*Health and Workers' Compensation Insurance of \$170,781:*

For employee benefits, the budget projects health insurance costs, which include District contributions to employees' Health Reimbursement Arrangement Voluntary Employees' Beneficiary Association (HRA VEBA), will increase by \$8,935, or 5.5% from the FY22 budget of \$161,846 to \$170,781 in FY23. Estimates are based on our insurance agent's quotes of the cost to renew our current plans on July 1, 2022, and on estimates of employees and dependents enrolled. Employees use their HRA VEBA account for qualified out-of-pocket medical care costs that are not covered by the medical plan. Consistent with current practice, the budget includes an employer contribution of \$140 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.

*Public Employees Retirement System (PERS) of \$240,245:*

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 are expressed as a percentage of covered payroll. The accumulated contributions and related earnings are intended to be sufficient to pay retirement benefits when due. The budget for PERS reflects the rates that were approved by the PERS Board and took effect on July 1, 2021. The FY23 budget rates remain at FY22 levels and are 24.29% for Tier I / Tier II employees (those hired on or before August 28, 2003) and 21.96% for all other eligible employees hired after August 28, 2003. The net change from the FY21 budget of \$211,446 is an increase of \$28,799, or 14%, consistent with the increase in salary and wages. The actuarially determined contribution rates reflect the effects of pension reform efforts over the last few years and the strong stock market, which have both helped to reduce the unfunded PERS liability.

*Payroll Taxes of \$113,180:*

Employer payroll taxes increased from the FY22 budget of \$98,980 by 14%, which is in proportion to the increase in salaries and wages, as expected.

## **Materials and Services – Operations Supporting Conservation Programs**

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 information technology (IT) services, vehicle maintenance, insurance, phone and internet services, staff and board training, and audit services. Also included are communications and outreach expenses such as community engagement through events, printed materials, online presence, signage, and displays. Overall, the FY23 budget of \$375,728 for Operations Supporting Conservation Programs increased by \$69,524, or 23%, from the FY22 budget of \$306,204. This increase is due to the amount budgeted for all costs associated with our office relocation, slightly offset by a decrease in office rental expense going forward. Our current office lease expires on 9/30/22. We have identified three specific properties that could meet our needs, and we are in the process of making a decision and finalizing costs. The \$75,000 budget for our move includes a 3-month overlap in rent for 7/1/22 through 9/30/22, costs for movers, supplies, cleaning, furniture to replace the built in desks and cupboards in our current space, storage space reconfiguration, and IT related buildouts for our server, extended cabling, phone system, and other infrastructure costs that will vary depending on which space is chosen.

## **Materials and Services – Conservation Programs**

The remaining Materials and Services costs are dedicated to conservation programs and services and represent 60% of the costs in this category. The table below highlights changes from the prior year. See [Section 2: The District](#) for more details about these conservation programs and services that support our goals.

<b>Conservation Area</b>	<b>FY 22</b>	<b>FY 23</b>	<b>Increase / (Decrease)</b>	<b>%</b>	<b>Reason for Change</b>
<b>Soil and Farms</b>	35,650	80,250	44,600	125	Increase for grant funded habitat restoration projects on Sauvie Island farms.
<b>Habitats</b>	107,250	74,070	(33,180)	(31)	Decrease due to completion of wetlands restoration project on Lower McCarthy and other riparian and upland oak habitat projects reaching establishment phase.
<b>Forests</b>	54,450	48,520	(5,930)	(11)	Decrease in funding for new forest early stand improvement projects that promote native habitat diversity in the understory forest. Capacity is restrained due to vacant Field Conservationist position.
<b>Urban</b>	22,450	28,950	6,500	29	District cost share with the City of Portland for acquisition of a key Fanno Creek headwaters parcel that would be owned by City of Portland BES. This is to stimulate a permanent agreement with City of Portland for protecting many years of conservation investment by the District and others for the the SW 25th Avenue corridor project.
<b>Invasive Species</b>	88,300	99,733	11,433	13	Increase due to Willamette Confluence & Sauvie Island Aquatic Weed Control grant funded work.
<b>Education</b>	10,500	18,400	7,900	75	Increase due to program redesign to focus on community-supported and desired gardens.
<b>Partner Support</b>	172,500	199,300	26,800	16	Partner support for greater capacity needs among existing partners. Additional funds for new community and garden education partners centered on BIPOC communities and organizations.
<b>Total</b>	<b>491,100</b>	<b>549,223</b>	<b>58,123</b>	<b>12</b>	



The most significant component of conservation services spending is partner support. As the table below shows, our partner funding has remained fairly stable, with some increases to many of our existing partners and new yet-to-be identified partners centered on community and garden education with a focus on Black, Indigenous, and people of color (BIPOC) communities. In addition to the partners to whom we provide funding, we work with a wide variety of partners to accomplish our goals and fulfill our mission. See more information in [Section 2](#).

Partners	FY 22	FY 23	Increase / (Decrease)	%
<b>Westside Watershed Resources Center</b>	33,000	33,000	-	-
<b>Backyard Habitat Certification Program</b>	30,000	30,500	500	2
<b>Forest Park Conservancy (includes Canopy Weed Program)</b>	28,000	30,000	2,000	7
<b>Tryon Creek Watershed Council</b>	22,500	29,000	6,500	29
<b>Community and Garden Education Partner(s)</b>	-	15,000	15,000	new
<b>Scappoose Bay Watershed Council</b>	10,000	10,000	-	-
<b>Ecology in Classrooms and Outdoors</b>	10,000	10,000	-	-
<b>Sauvie Island Center</b>	10,000	10,000	-	-
<b>Friends of Tryon Creek</b>	9,500	9,800	300	3
<b>OSU IPM Website</b>	7,500	-	(7,500)	(100)
<b>4-County Cooperative Weed Management Area</b>	7,500	12,500	5,000	67
<b>iMap Invasives Oregon</b>	4,500	9,500	5,000	111
<b>Total Partner Support</b>	<b>\$172,500</b>	<b>\$199,300</b>	<b>\$26,800</b>	<b>16</b>

### **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 are not a significant category of spending for us. In the past, spending has primarily been for more expensive office equipment (computer servers and other technology-related upgrades) and vehicles. The capital outlay budget for FY23 is \$40,000 and includes \$30,000 for a new boat for aquatic weed surveying, a used vehicle, and technology-related purchases, as well as \$10,000 for Sturgeon Lake restoration project capital needs.

### **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.

## **Reserve for Future Opportunities**

This account represents funds reserved annually to save for future opportunities. The amount set aside in our budget is \$25,000, consistent with the last three years. As part of our financial sustainability work, we will further define under what circumstances these funds would be used. Any use will be consistent with the goals and priorities in our long-range business plan.

## **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**

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. This category includes the amount of money the District needs to cover expenses after FY23 ends and before substantial tax revenue are expected. We are budgeting \$877,500, which assumes spending of \$195,000 per month. 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 2023 period. This category also includes the Stewardship Account, expected to be \$81,410 at June 30, 2023, representing the assignment of funds to future Sturgeon Lake-related obligations. Additionally, as mentioned above, the District has been annually setting aside funds for future opportunities and to ensure economic stability; these funds are expected to be \$125,000 at June 30, 2023. The total of all these items is budgeted to be \$1,083,910.

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

Prior to FY22, the Sturgeon Lake Special Fund was budgeted for as a separate distinct fund from the General Fund. The purpose of the fund was to clearly identify, track, and account for external funds contributed to the Sturgeon Lake Restoration Project by third-party non-federal partners. Once the project was completed, the fund was closed out, and the portion of the Sturgeon Lake Fund that contained specifically assigned amounts in an account called the Sturgeon Lake Stewardship Account was transferred to and maintained within the General Fund. The Stewardship Account was established in 1993 by a Memorandum of Agreement with the Oregon Department of Environmental Quality, the Oregon Department of Fish and Wildlife (ODFW) and the District for the purpose of performing long-term ongoing maintenance and monitoring of the Sturgeon Lake Restoration Project.

Ongoing expenses related to maintaining the restoration site are budgeted for in FY23, as they were in FY22, within the General Fund. These expenses include \$13,000 of continuing real estate contract costs associated with negotiating a long-term agreement with the Oregon Department of State Lands. The agreement will allow continued maintenance and monitoring of that portion of the project that falls within the tidally influenced areas owned by the State of Oregon. Additionally, ongoing expenditures of \$25,950 for restoration and maintenance of the riparian conditions within the project are included in our FY23 soil and farms conservation budget.

[Form LB-10](#) shows the resources and requirements within the Sturgeon Lake Special Fund. Although there is no FY23 budget for the Sturgeon Lake Special Fund, the District is required to submit the

historical information (FY20, FY21, and FY22) presented on Form LB-10 to the Oregon Department of Revenue.

## **Summary**

The FY23 budget reaffirms our commitment to working lands conservation, clean water, healthy soil, and diverse habitats throughout the District. Our services, delivered equitably to our community in the form of technical and financial assistance, as well as conservation education to protect natural resources, will always be the focus of everything we do. Our sound fiscal management will ensure we have a strong and sustainable financial foundation to support those services.

## **SECTION 2: THE DISTRICT**

### **Who We Are and What Guides Our Behavior**

#### **Mission**

We provide resources, information, and expertise to inspire people to actively improve air and water quality, fish and wildlife habitat, and soil health.

#### **Vision**

All people in our district are informed about and confidently engaged in the long-term caring for and giving back to the land. Everyone has the opportunity to connect or reconnect with the land, especially those who have been displaced from or deprived of land. People's engagement and connection to the land ensures clean water, clean air, healthy soil, and diverse habitats for thriving communities, fish, and wildlife.

#### **Guiding Values – Expressions of What We Believe**

- Equity – Diversity, equity, and inclusion strengthen our work.
- Reciprocity – Land, water, and all living things and the ecosystems that support them have intrinsic value; if we take care of the land and resources, the land and resources will take care of us.
- Adaptive – Effective and lasting conservation is community-based, science-based, and adaptive to new knowledge and other ways of knowing, including Traditional Ecological Knowledge.
- Engagement – For our conservation work to be successful, people and communities must connect to and benefit from it.

#### **Guiding Principles – Determinants that Explain Our Behavior**

- Conservation Planning – We engage people and communities through deliberate processes that identify conservation opportunities that align with people's goals and objectives.
- Science Based – We address conservation problems methodically. We identify and analyze natural resource concerns before determining best solutions, as called for by conservation science including other ways of knowing such as Traditional Ecological Knowledge.
- Climate Change – We work to reduce the threats to the health of local ecosystems, communities, and economies caused by climate change.
- Relationship with the Land – We work so that all people have the opportunity to build positive relationships with the land.
- Opportunity – We engage people in conservation by sharing information, demonstrating practices, and directly involving them in projects.
- Partnerships – We form partnerships to leverage our resources and funds, expand our reach, and to avoid duplicating efforts.
- Financial Accountability – The public entrusts us with their funds. Our responsibility is to expend funds for the public good in an efficient and effective manner compliant with budget laws, subject to independent audit.
- Timely Service – We respond to requests for information and assistance in a timely and courteous manner; if we cannot provide direct assistance, we strive to find others who can.

- Non-Regulatory – We are a non-regulatory organization that encourages and provides incentives for voluntary conservation.
- Non-Partisan – We respect the privacy and individuality of people.
- Integrity and Balance – We act with integrity and operate with transparency; we encourage and support a healthy work-life balance for our board, staff and volunteers, and work as members of a flexible, respectful, and responsive team.

## **Our Strategic Directions, Goals, and Tactics**

Strategic Directions define the scope of our work.

- Strategic Direction #1 – Equity & Inclusion
- Strategic Direction #2 – Organizational Health
- Strategic Direction #3 – Financial Sustainability
- Strategic Direction #4 – Sharing Conservation Information
- Strategic Direction #5 – Water & Soil
- Strategic Direction #6 – Habitats & Biodiversity
- Strategic Direction #7 – Working Farms, Forests and Gardens
- Strategic Direction #8 – Climate Change
- Strategic Direction #9 – Relationships with the Land
- Strategic Direction #10 – Long-term Success

Strategic directions #1-3 are foundational and necessary for the long-term success of the District. Strategic direction #4 intersects and supports all of the strategic directions, especially the conservation strategic directions (#5-#10).

Each strategic direction has a set of goals and tactics that define more specifically the District's area of work for that strategic direction over the next five years. Goals, and their associated tactics, have been ranked in priority order of importance. Tactics provide specific actions that further illuminate the purpose of the goal they belong to as well as provide direction for the District's annual work plans and corresponding budget. Some of the District's work is prioritized to occur within defined geographic focus areas: (1) working lands, (2) priority landscapes, (3) priority habitats, (4) priority watersheds, and (5) priority education focus areas. Geographic focus areas are a guide to help allocate staff time and financial resources to specific areas of the District because our staff time and financial resources fall short of being able to work everywhere there is opportunity within our District. Geographic focus areas are determined through an analysis of resource concerns and conservation opportunity where District investment in conservation will have the greatest impact – either ecologically, socially, or economically – and in some cases all three. The District strives to maintain balance between conducting outreach to interested parties, as a way to create conservation opportunity within a geographic focus area, and remaining flexible and able to respond to a request for conservation assistance in an area falling outside a geographic focus area.

The District's annual budget supports our mission, strategic directions, and goals. In developing the budget, we considered the priorities and issues (see [Budget Message](#)) impacting our work in FY23. The budget funds the implementation of individual staff annual work plans, collectively forming the District's annual work plan, a comprehensive list of the tactics, projects, and other actions that are necessary to achieve specific strategic goals. The District's performance of and progress on the annual work plan is

evaluated against metrics that define thresholds for success. See a summary of our metrics in the [Trends and Performance Measures](#) table below.

## **Our Operations**

Each of the following programs or areas of emphasis helps us achieve our mission.

### **Conservation Planning**

District conservationists work with landowners to develop conservation plans. 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 by supporting the management of their lands for agriculture, forestry, and other natural resource benefits. 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.

#### **Farms**

The District partners with the U.S. Department of Agriculture's Natural Resources Conservation Service (NRCS), the Oregon Department of Agriculture (ODA) and Oregon State University (OSU) Extension Service to provide farmers the education, technical and financial assistance for preventing soil erosion, improving soil health and maintaining water quality while operating their farm. Historically, the District has worked mostly with produce, livestock, and horse farms on Sauvie Island. In recent years, staff, board members, partners, and community members have collaborated to broaden our reach by assisting any farm in the District – including urban farms and operations of all sizes 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. Consistent with our LRBP strategic direction on diversity, equity, and inclusion, our farms program continues to evolve to reach those newer to farming.

The District helps farmers by providing them with comprehensive conservation plans and connections to financial resources to help them with soil health. These resources include NRCS Farm Bill conservation programs as well as 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 (described below).

#### **Forests**

The District is the lead management planning, technical and financial assistance provider to private non-industrial forest landowners located within our service area (see first page past the cover of our [LRBP](#)). The overall goal is to help landowners understand their social, economic and ecologic 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 young stand development by removing unhealthy overcrowded trees 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. A priority landscape geographic focus area in the Tualatin Mountains – the Greater Forest Park Ecosystem priority landscape (see page 36 of the [LRBP](#)) – is centered on partnerships with the

Forest Park Conservancy, Metro Parks and Nature, Forest Park Neighborhood Association and other non-governmental conservation 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; and 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 have become established. Oak habitat restoration includes both removing competing vegetation, such as overtopping Douglas-fir trees and competing 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 also 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.

The District assists private landowners by helping them to enhance their wetland habitats, including floodplain, emergent wetland, wet prairie, off-channel habitat for salmon, and large ponds. The District and our partner, the Columbia River Estuary Study Taskforce (CREST), are also assisting with ongoing efforts to enhance juvenile salmonid habitat on Sauvie Island and at McCarthy Creek's confluence with the Multnomah Channel.

The District collaborates with the Sauvie Island Habitat Partnership & Scappoose Bay Watershed Council (SBWC) to present educational workshops and create educational documents and plans for special habitats – such as the [Sauvie Island and Multnomah Channel Bottomlands Conservation Opportunities](#) publication; We also collaborate to oversee wildlife surveys and construct basking structures for native turtles; and to engage the moorage community along the Multnomah Channel to monitor and protect water quality, and improve special habitats including ponds, shorelines, and oak. In partnership with SBWC and the moorage community, [Living on the Water: A Guide for Floating Home Owners and Marina Managers](#) continues to serve as a useful resource. 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. Priority watersheds for the District's Healthy Streams Program include McCarthy Creek, Abbey and Rock Creek in the rural West Hills, and the drainage canals and ditches on Sauvie Island. The District provides project 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 (SIDIC) to identify and implement improved canal maintenance practices and to survey for aquatic invasive weeds. In partnership with SBWC, and with funding secured from the Oregon Department of Environmental Quality, water quality monitoring has occurred on the Sauvie Island canals. The SBWC inventories specific canal reaches with respect to their condition in terms of bank stability, riparian habitat, and water quality in support of SIDIC's update of their canal operations and maintenance plan. This technical assistance will continue to be provided by the District through identification of best practices for canal maintenance, continued aquatic weed surveys, and the restoration of native riparian habitat.

### **Canopy Weeds**

In cooperation with the Forest Park Conservancy and Portland Parks & Recreation, this program offers urban and rural residents within the Greater Forest Park Ecosystem treatment of invasive canopy weeds such as ivy and clematis on trees. To participate in this fee-for-service program, residents must agree to keep these invasive plants from re-establishing on treated trees. The program's goal is to reduce ivy seed spread, save trees, and share information about the harmful effects of canopy weeds with residents. Previously treated sites are being monitored and follow-up with landowners is on-going regarding how this program improves their land as well as how well they have been able to achieve their maintenance obligations.

### **Stormwater and Habitat Demonstration Projects**

Primarily located in Portland's urban residential areas, stormwater and habitat demonstration projects provide examples to groups of neighbors, neighborhood associations, community organizations, and businesses of implemented urban conservation practices, including the use of interpretive signage and/or art. Examples include demonstration of stormwater projects, pollinator hedgerows, and meadowscapes. Projects that proactively engage, collaborate with and/or are led by historically underserved communities and/or community members, including communities of color, are prioritized for funding assistance. Past participants of this program are being surveyed to understand if their demonstration sites are actively maintained and used for information sharing and engagement. Opportunities to streamline processes and materials as well as collaborate with partners on outreach are pursued.

### **Healthy Watersheds**

The District works with people including residential homeowners, renters, homeowner associations, commercial land managers, and educational institutions to develop and implement conservation plans within priority watersheds (see page 36 of the [LRBP](#)). These conservation plans are focused on invasive plant removal, native plant establishment, stormwater management, and wildlife enhancements. Funding and project management support to assist with implementation of these plans is prioritized through a ranking of the overall acreage improved, unique critical habitats protected or enhanced, adjacency to natural areas and other restored properties, number of residents involved, and equity outcomes. Our work includes reviewing ecological outcomes from removing invasive plants, installing native plants, enhancing wildlife habitat, improving stormwater outcomes and engaging as well as educating residents in land management. This work is conducted in collaboration with culturally-specific green workforce development organizations.

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

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 District seeks to expand this program to include the survey



and control of invasive aquatic weeds such as *Ludwigia peploides*, *L. hexapetala*, *Phragmites australis* var. *australis* and *Lythrum salicaria* through an Oregon State Weed Board Priority Noxious Weed Grant.

For both terrestrial and aquatic weeds, 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 control measures).

### **Native Plant Revegetation**

District 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 and require a 50-50 cash/in-kind match that is provided by the participating landowner. Another aspect of this program – which the District is shifting toward due to limited capacity and funding to implement full-scale restoration plans – is to provide landowners that have an EDRR treatment site with access to restoration kits such as native plants and native seed mixes with directions on how to use them. Landowners are expected to perform any additional site preparation and are responsible for sowing the seed and/or installing the native plants and maintaining the plants until they become established

### **Environmental Education Programs**

Environmental 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 also provides education program funding or in kind support to partner organizations such as the Sauvie Island Center, Ecology in Classrooms and Outdoors, and Friends of Tryon Creek. As a result of the Education Niche Finding project, the District will be responding to diverse community and education leaders' requests to better facilitate land access and related educational activities that best serve historically underserved community members through an increase in funding support of community gardens and BIPOC-led and/or serving partnership organizations.

### **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 salmon, sturgeon, and Pacific lamprey, and is an integral part of the Pacific flyway for pacific coast migratory waterfowl. Thanks to the success of the [Sturgeon Lake Restoration Project](#), hydrological flows from the Columbia River to the lake have been restored and the threat of increasing sedimentation and shallowing of Sturgeon Lake has been abated. Ongoing restoration of native riparian plant communities along Dairy Creek continues. The District also is negotiating a permanent access agreement with the Oregon Department of State Lands (DSL)

to allow the District to perform monitoring and maintenance of the Dairy Creek channel below the ordinary, tidally influenced high watermark.

The District continues to partner 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 have installed the 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 are responsible for the management of the data collected from the PIT tag array.

### **Conservation Partner Support**

The District maintains and funds several strategic partnerships to maximize our resources and minimize duplication with other organizations.

*Backyard Habitat Certification* – 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 information sharing, outreach, and planning that supports our mission, including equitable outcomes for all. The Backyard Habitat Certification Program provides onsite assistance and resources to urban residents that live on one acre or less for controlling invasive weeds, installing native plants, enhancing wildlife habitat, and addressing stormwater runoff. The two partner organizations that jointly manage and deliver the Columbia Land Trust and Portland Audubon – receive partner funding from the District to deliver the program to residents within our service area.

*Forest Park Conservancy* – In addition to delivering the Canopy Weeds program, the Forest Park Conservancy helps us focus on critical habitat corridor issues, invasive species, volunteer engagement, and green infrastructure in northwest Portland within the Greater Forest Park Ecosystem). The Forest Park Conservancy has been a leader in developing a green workforce intern program centered on process access to Black, Indigenous and other people of color to natural resource jobs and career opportunities and the District hosts work conducted by Forest Park Conservancy green workforce intern program at project sites.

*Tryon Creek Watershed Council* – The Tryon Creek Watershed Council focuses on riparian and upland habitat restoration, water quality, invasive species, community engagement and fish passage in the priority Tryon Creek watershed in southwest Portland (see page 3 of the [LRBP](#)) through monitoring, watershed planning, workshops, volunteer work parties, community events, and the coordination of partnerships. The Tryon Creek Watershed Council is an established leader in embedding justice, equity, diversity and inclusion (JEDI) into all programs.

*Westside Watershed Resource Center* – The Westside Watershed Resource Center works with southwest and northwest 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 Watershed Resource Center coordinates and implements 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. Through the Westside Watershed Resource Center the District seeks to be a contributing financial sponsor of the annual Eena (Beaver) Festival.

*West Willamette Restoration Partnership* – The [West Willamette Restoration Partnership](#) coordinates 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.

*The 4-County Cooperative Weed Management Area and the iMap Invasives project* are our partner programs that receive funding support from the District because these applications support our EDRR invasive species operations.

### **Long-Term Success**

Strategic direction #10 of the Long Range Business Plan – Long-Term Success – calls for the long-term continuous success of our conservation actions. Traditionally our long-term success actions centered on providing project hosts with the tools to maintain the District's conservation investments over time and at times providing additional technical and financial assistance to keep restoration projects from unwinding. Monitoring the effectiveness of our conservation projects is central to District operations in all program areas because the information collected allows us to determine that projects are providing their intended conservation benefit in terms of clean water, diverse soils, productive working lands and gardens as well as diverse habitats. If the monitoring shows us the projects are not performing as expected then we can respond to these findings with an adaptive management approach by re-evaluating the design and implementation of our conservation projects.

A new area added to the LRBP is to identify the types of agreements we should use to secure conservation benefits from our projects and actions for the long-term. One initiative that the District will be working on in FY23 is investigating how to protect in perpetuity the multiple years of conservation investment in the SW 25<sup>th</sup> Avenue corridor project, a long-term urban demonstration project along an unimproved roadway. The time has come to secure agreements with the City of Portland Bureau of Transportation and Bureau of Planning & Sustainability to permanently protect the project area, which is currently designated as a safe route to schools. A Local Improvement District application to widen and improve the roadway would wipe out the integrity of the project's restoration work – not only the District's investments, but the investments made by partners such as Friends of Fanno Creek Headwaters, Metro Parks and Nature, City of Portland Bureau of Environmental Services, and the sweat equity of residents located along SW 25<sup>th</sup> Avenue. There is also a parcel containing the source headwaters for Fanno Creek that if acquired for conservation would protect the headwaters permanently from development. The District has budgeted funds toward the acquisition of this parcel to serve as a catalyst to get a long-term agreement in place with the City of Portland and Friends of Fanno Creek.

A second initiative is working with the Forest Park Conservancy on a model conservation easement program for forested properties in the Greater Forest Park Ecosystem. Many landowners have expressed interest in donating easements to the Forest Park Conservancy and the District has developed a model where the allowed forest management under the easement is determined every five years through the collaborative development of a Forest Stewardship Plan (a.k.a. forest management plan) that legally must maintain, enhance, and protect the conservation values identified in the easement. The District successfully completed a pilot project for a 60-acre parcel in the McCarthy Creek watershed in FY22 and plans to implement future projects with the Forest Park Conservancy

using the conservation easement-Forest Stewardship Plan model developed through the pilot. This approach leverages the District strengths – providing technical expertise in forestry and in writing Forest Stewardship Plans – leaving the administrative and legal responsibilities for holding the conservation easement with the Forest Park Conservancy. The end results are conservation easements that are nimble in their forest management and in how the conservation values are protected over time.

## **Support for Conservation Programs and Fiscal Oversight**

### *Communications & Outreach*

The District maintains consistent conservation messaging and operates in a strategic manner to reach constituents who benefit from District conservation information sharing and practices. We engage partner and neighborhood organizations, and residents of the District in a collaborative manner to build confidence within the community about conservation issues and opportunities, and actions needed to address them. Our communication tools include our website, social media, newsletters, annual reports, news releases, workshops, articles in community newsletters, and outreach activities including event tabling, presentations, and public speaking engagements. Many of these operations have successfully pivoted to the COVID-19 virtual world of on-line learning. The District produces a wide variety of products to help share conservation information with residents, landowners, and homeowners about priority program areas and conservation activities. Products include books, brochures, flyers, mailers, videos, banners, signs, stickers, and other creative materials.

### *Administrative Operations*

To maximize efficiencies and staff capacity, the administrative operations team provides support on grant reporting, contracting, vehicle fleet needs, and technology used in the office and out in the field. The team transitioned the District during the two-year long coronavirus pandemic to a successful remote office working environment, and plans are underway for a return to new office space in mid- to late-2022. Our new model includes hybrid work options for staff. 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 Controller, District Manager, 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, discussing any variances from budget and changes in financial position. Financially, the District has done a good job of sustaining programs and funding special initiatives, while ensuring that the organization is fully compliant with all laws and regulations pertaining to public funds. Specifically, the District has a strong, effective, and comprehensive system of fiscal, budgetary, and internal controls to protect the public funds entrusted to the care of the District.

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.

## **Who We Work With**

The District partners with various agencies, organizations, and individuals in an effort to fulfill our mission and achieve our vision. The partnerships are formed through various memorandums of agreement, working agreements, intergovernmental agreements, and informal arrangements and understandings. Formal agreements outline the responsibilities of each partner and identify the types of assistance, resources, and support each will provide to accomplish common goals.

The District believes that our partners, which include individuals, non-profits, government organizations, private companies, landowners, and volunteers, are crucial to our 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.

### **Landowners, Producers, and People**

We would like people to see the District as its primary point of contact for not only District programs but those of the ODA, NRCS, the Oregon Watershed Enhancement Board, Metro Parks and Nature and the City of Portland. Landowners, tenants and agricultural/forestry 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. The District assists residents with conservation planning, technical and financial assistance, federal farm bill program opportunities, and answers to conservation-related questions. The District provides people within our 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. By making these investments with landowners, tenants and agricultural/forestry producers, so they can achieve their goals, we produce public conservation benefit in terms of clean water, healthy soil, productive working lands, and gardens and diverse native habitats.

### **Oregon State University Extension Service**

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. This arrangement is currently suspended due to COVID-19 safety protocols but may resume once these safety protocols are lifted and the Master Gardeners express the need to be co-located at the District office.

### **Local Government**

The District works with a diverse group of key partners in local government agencies: City of Portland (Parks and Recreation, Bureau of Environmental Services, and Bureau of Planning & Sustainability), Metro Parks and Nature, Multnomah County, Clackamas County, Columbia County and Washington County as well as our neighboring soil and water conservation districts: Clark (Clark County, Washington), Clackamas, Columbia, East Multnomah, and Tualatin.

## **State Government**

State partners include the Oregon Department of Agriculture, the Oregon Department of Environmental Quality, the Oregon Department of Fish and Wildlife, the Oregon Department of Forestry, the Oregon Department of State Lands, the Oregon Parks and Recreation Department and the Oregon Watershed Enhancement Board.

## **U.S. Department of Agriculture, Natural Resource Conservation Service (NRCS)**

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. We also receive technical assistance grant funds from the National Association of Conservation Districts to expand NRCS' capacity in implementing NRCS's farm, forest and habitat programs. In turn, NRCS provides technical assistance to the District and directly to landowners and producers within the District's service area.

## **Local Advisory Committee**

Local Advisory Committees (LACs) 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.

## Trends and Performance Measures

Metrics	FISCAL YEAR TOTAL					
	2016-2017 Actual	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	2021-2022 Goals
Conservation Plans Completed	39	32	27	12	12	25
Residents and Land Managers Served	825	824	546	605	654	700
Acres Treated for Invasive Plants	129	46	47	88	Data not available	100
Acres of Native Habitat Enhanced	251	257	236	146	183	250
Acres of Cropland Improved through Soil Health Practices	38	25	47	47	34	50
Native Plants Installed	55,623	30,985	69,926	43,123	18,964	60,000
Linear Feet of Streams/Banks Enhanced	46,090	36,254	30,826	31,311	25,882	30,000
People Served at Outreach Events	1,237	2,570	1,915	1,682	660	2,000

## **SECTION 3: BUDGET PROCESS**

### **Budget Preparation**

The annual budget is in compliance with Oregon Budget Law, which guides the District through the budgeting process and is defined in Oregon Revised Statute (ORS) Chapter 294.305 to 294.565 of Oregon State Law. The budget supports implementation of the District's annual work plans and programs in order to fulfill the District's mission, vision, and goals as discussed in [Section 2](#).

The budget is prepared on a modified accrual basis (recognizing revenues when they become available and measurable, and recognizing expenditures when liabilities are incurred), consistent with the modified accrual basis used to prepare our Fund Financial Statements. In contrast, our Government-wide Financial Statements (i.e., the statement of net position and statement of activities) report information using the economic resources measurement focus and the accrual basis of accounting. For the Government-wide Financial Statements, revenues are recorded when earned and property taxes are recognized as revenue in the year for which they are levied. Both our Fund Financial Statements and our Government-wide Financial Statement are prepared in conformity with generally accepted accounting principles as applied to governmental units.

The District's sole fund for Government-wide Financial Statements reporting is the General Fund. Prior to FY22, the District legally adopted a separate budget for the Sturgeon Lake Fund to track and account for external funds contributed to the Sturgeon Lake Restoration Project by third-party non-federal partners. Upon the project's completion and expectations of only minimal activity, the Sturgeon Lake Fund was closed in June 2021, and ongoing maintenance and monitoring of the Sturgeon Lake Restoration Project and the amounts assigned to the Stewardship Account are budgeted for within the General Fund.

### **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, Oregon Revised Statutes (ORS) chapter 568. An elected Board of Directors, representing five geographical zones and two at-large positions, governs the District. The Board includes three 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 2008. 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 hold public meetings and present the proposed budget to the Budget Committee for their approval. These meetings are normally held 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](#) 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 budget and highlight any



significant changes in the District’s financial position. These documents are available at the District office and on the District website ([wmswcd.org](http://wmswcd.org)).

## Budget Committee

The Budget Committee (see table below) is composed of the District’s seven-member elected 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.

<b>Name</b>	<b>Position</b>	<b>Status</b>
Rachel Dvorsky	Elector	Term expires 12/31/23
Laura Foster	Elector	Term expires 12/31/24
Genevieve Fu	Elector	Term expires 12/31/24
April Gutierrez	Elector	Term expires 12/31/24
Jan Hamer	Elector	Term expires 12/31/23
Xuan Sibell	Elector	Term expires 12/31/22
Edward Woods	Elector	Term expires 12/31/22
Jane Hartline	Board, Zone 2	Elected Board member through 12/31/2024
Brian Lightcap	Board, Zone 4	Elected Board member through 12/31/2022
Shawn Looney	Board Secretary, At-Large	Elected Board member through 12/31/2022
Weston Miller	Board Treasurer, At-Large	Elected Board member through 12/31/2024
Kim Peterson	Board, Zone 1	Elected Board member through 12/31/2024
Terri Preeg Riggsby	Board Chair, Zone 5	Elected Board member through 12/31/2022
George Sowder	Board Vice-Chair, Zone 3	Elected Board member through 12/31/2024

## 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 any 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 by Fund, which for the District going forward is only the General Fund. The total appropriated amounts include personnel, material and 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.

# Budget Calendar

Item	Notes	Dates
<b>Confirm budget committee members and solicit new public members if necessary</b>	The budget committee is composed of the elected governing board and an equal number of electors appointed by the governing body.	December and January
<b>Post notice of Budget Committee openings (if any) on website and other media</b>	There is not a specific requirement to publish/post, but it is helpful for recruiting public members.	January
<b>Prepare Budget Calendar</b>	Calendar posted on website and sent to the Tax Supervising & Conservation Commission (TSCC).	1/11/2022
<b>Appoint Budget Officer by resolution at Board Meeting</b>	Required by ORS 294.331. Controller to serve as Budget Officer.	2/15/2022
<b>Appoint (if applicable) new public members of Budget Committee at Board Meeting</b>	Budget Committee consists of all Board members plus an equal number (7) of public members.	2/15/2022 or 3/15/2022
<b>Publish Notice of Budget Committee Meeting</b>	Per Local Budget Law, the first notice is published in a newspaper (5-30 days prior to meeting date); if second notice is posted on District website, the newspaper notice must give the website address where the notice will be posted.	3/22/2022
<b>Publish 2<sup>nd</sup> Notice of Budget Committee Meeting</b>	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.	3/22/2022
<b>Prepare Proposed Budget and Budget Message</b>	Prepared by Budget Officer. Post on Website and send link to Budget Committee Members.	4/18/2022
<b>Budget Committee Meeting 1</b>	Public Comments taken at this time.	4/19/2022
<b>Budget Committee Meeting 2</b>	Second meeting, if necessary, to approve budget.	4/26/2022
<b>File Approved Budget with TSCC</b>	At least 30 days before Budget Hearing and no later than May 15th; TSCC reviews and prepares Certification Letter.	5/15/2022
<b>Publish Notice of Budget Hearing</b>	To be published in widely-distributed newspaper 5 to 30 days before hearing.	5/20/2022
<b>Budget Hearing</b>	For acceptance of Public Comment on the Budget.	6/21/2022
<b>Enact Resolutions</b>	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.	6/21/2022
<b>File Adopted Budget with TSCC</b>	Due within 15 days of adoption. Include response, if applicable, to Certification Letter.	7/5/2022
<b>Submit resolutions and tax certification documents to County Assessor's Office</b>	Copies must be sent to Multnomah, Columbia and Washington Counties by July 15.	7/15/2022
<b>File copies of budget with County Clerk</b>	Copies must be sent to TSCC (in lieu of Multnomah County), Columbia and Washington Counties by September 30.	9/30/2022

# SECTION 4: FINANCIAL SUMMARIES

## Five-Year Financial Results

The following table summarizes our General Fund revenues, expenditures, and changes in fund balances since FY17. It can be compared to our [five-year financial forecast](#), which follows.

For the Year Ended:	FY17		FY18		FY19		FY20		FY21		FY22		FY23
	Actual	% Change	Actual	% Change	Actual	% Change	Actual	% Change	Actual	% Change	Adopted Budget	% Change	Proposed Budget
<b>REVENUES:</b>													
Property tax income	1,458,879	4%	1,532,969	5%	1,615,254	5%	1,663,586	3%	1,717,093	3%	1,755,934	2%	1,947,093
Grant income	199,891	62%	211,332	6%	208,040	-2%	222,564	7%	206,942	-7%	229,759	11%	254,557
Fundraising for Sturgeon Lake													
Misc. & Charges for services	15,641	-5%	16,546	6%	17,288	4%	16,748	-3%	14,826	-11%	27,890	88%	23,215
Interest	11,194	59%	18,171	62%	29,802	64%	26,024	-13%	9,208	-65%	7,500	-19%	5,500
Total revenues	1,685,605	9%	1,779,018	6%	1,870,384	5%	1,928,922	3%	1,948,069	1%	2,021,083	4%	2,230,365
<b>EXPENDITURES:</b>													
Personnel services	954,451	8%	1,067,209	12%	1,127,636	6%	1,269,916	13%	1,278,300	1%	1,443,268	13%	1,634,504
Materials and services	695,137	14%	641,885	-8%	587,720	-8%	579,476	-1%	495,051	-15%	797,304	61%	924,951
Capital outlay	22,696	447%	7,200	-68%		-100%	-	-	-	-	18,650	-	40,000
Total before transfers, reserves and contingencies	1,672,284	12%	1,716,294	3%	1,715,356	0%	1,849,392	8%	1,773,351	-4%	2,259,222	27%	2,599,455
Transfer to/(from) Sturgeon Lake Fund					21,729		170,500	685%	(48,586)	-128%	-		-
Reserve for Future Expenditures											25,000		25,000
Contingency	-		-		-		-		-		50,000		50,000
Total use of funds	1,672,284	12%	1,716,294	3%	1,737,085	1%	2,019,892	16%	1,724,765	-15%	2,334,222	35%	2,674,455
<b>Change in fund balances</b>	13,321		62,724		133,299		(90,970)		223,304		(313,139)		(444,090)
Fund balance, beginning of year	941,975		955,296		1,018,020		1,151,319		1,060,349		1,286,000		1,528,000
Fund balance, end of year	955,296	1%	1,018,020	7%	1,151,319	13%	1,060,349	-8%	1,283,653	21%	972,861	-24%	1,083,910
<b>Months of Operating Expenditures</b>	<b>6.9</b>		<b>7.1</b>		<b>8.1</b>		<b>6.9</b>		<b>8.7</b>		<b>5.2</b>		<b>5.0</b>

## Five-Year Financial Forecast

The District prepares financial forecasts reflecting our long-range business plan on an ongoing basis, taking into account operational and economic variables. Our annual expenditures of approximately \$2.7 million are primarily supported by our permanent property tax levy, which represents 87% of our annual revenues. We have no construction, minimal capital spending (primarily for work vehicles and information technology needs), and no debt.

For our forecast, we evaluate projected property tax growth and collection rates, interest rates, wage growth, cost-of-living adjustments (COLA), PERS rates, health benefits, and service levels. As always, our forecast is very conservative. It assumes continued growth in property tax revenue, increasing availability of grant revenue, modest increases in personnel costs to account for increasing COLA, PERS rates, and healthcare expenses, and very minimal merit-based step increase for staff as almost half are reaching the top step level for their position in FY23 and the majority will reach the top level by FY25. The category of materials and services may need to be decreased in FY24 in order to manage budgeting limitations. Our focus will be ensuring maintenance of ongoing conservation work. Any additional conservation work taken on will need to be supported by grant funding. Sturgeon Lake restoration maintenance work, which continues to be budgeted for within the General Fund, may need to become self-supporting beginning in FY24 through fund-raising in order to replenish its Stewardship Account.

For the Year Ended:	FY22		FY23		FY24		FY25		FY26		FY27		FY28	
	Adopted Budget	% Change	Proposed Budget	% Change	Forecast	% Change	Forecast	% Change	Forecast	% Change	Forecast	% Change	Forecast	% Change
<b>REVENUES:</b>														
Property tax income	1,755,934	2%	1,947,093	11%	2,024,976	4%	2,085,726	3%	2,148,297	3%	2,212,746	3%	2,279,129	3%
Grant income	229,759	16%	254,557	11%	280,013	10%	308,014	10%	338,815	10%	372,697	10%	409,967	10%
Fundraising for Sturgeon Lake					30,000	1%	30,300	1%	30,603	1%	30,909	1%	31,218	1%
Misc. & Charges for services	27,890	36%	23,215	-17%	23,447	1%	23,682	1%	23,918	1%	24,158	1%	24,399	1%
Interest	7,500	-57%	5,500	-27%	5,555	1%	5,611	1%	5,667	1%	5,723	1%	5,781	1%
Total revenues	2,021,083	3%	2,230,365	10%	2,363,991	6%	2,453,332	4%	2,547,301	4%	2,646,233	4%	2,750,493	4%
<b>EXPENDITURES:</b>														
Personnel services	1,443,268	10%	1,634,504	13%	1,650,849	1%	1,667,358	1%	1,684,031	1%	1,700,872	1%	1,717,880	1%
Materials and services	797,304	22%	924,951	16%	754,951	1%	754,951	0%	754,951	0%	754,951	0%	754,951	0%
Capital outlay	18,650	-	40,000	114%	5,000	-88%	5,000	0%	5,000	0%	5,000	0%	5,000	0%
Total before transfers, reserves and contingencies	2,259,222	15%	2,599,455	15%	2,410,800	-7%	2,427,309	1%	2,443,982	1%	2,460,823	1%	2,477,831	1%
Transfer to Sturgeon Lake Special Fund			-		-		-		-		-		-	
Reserve for Future Expenditures	25,000	-	25,000	0%	25,000	0%	25,000	0%	25,000	0%	25,000	0%	25,000	0%
Contingency	50,000	-	50,000	0%	50,000	0%	50,000	0%	50,000	0%	50,000	0%	50,000	0%
Total use of funds	2,334,222	9%	2,674,455	15%	2,485,800	-7%	2,502,309	1%	2,518,982	1%	2,535,823	1%	2,552,831	1%
<b>Change in fund balances</b>	(313,139)		(444,090)		(121,809)		(48,977)		28,319		110,411		197,662	
Fund balance, beginning of year	1,286,000		1,528,000		1,083,910		962,101		913,124		941,442		1,051,853	
Fund balance, end of year	972,861	22%	1,083,910	11%	962,101	-11%	913,124	-5%	941,442	3%	1,051,853	12%	1,249,515	19%
<b>Months of Operating Expenditures</b>	5.2		5.0		4.8		4.5		4.6		5.1		6.1	

## Budget Documents and Funds

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 FY19 and FY20 audited financial results, FY21 Adopted Budget, and FY23 Budget. In FY21, the District made the decision to close out its Special Fund for the Sturgeon Lake Restoration Project (Sturgeon Lake Fund) because the restoration project was completed. Although there will be ongoing monitoring and maintenance of the project, there is no longer a need to have a separate fund for these costs, which are not considered significant to the District as a whole. Within the General Fund, the District will maintain the Sturgeon Lake Stewardship Account, which will be used for non-routine restoration project costs as needed. For the FY23 Budget, the District will have only one fund, the General 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.

Specific forms submitted by the District are: Notice of Budget Hearing, to be prepared after the budget is approved by the Budget Committee; General Fund Resources ([Form LB-20](#)); General Fund Requirements ([Form LB-30](#)); Special Fund (Sturgeon Lake) Resources and Requirements ([Form LB-10](#)), which will be required through FY24 to present the historical information for the fund even though it is now closed; and a supplementary schedule of [Detailed Resources and Requirements](#). These forms can be found below.

## General Fund Resources

FORM LB-20			RESOURCES General Fund (Fund)		West Multnomah SWCD		
Historical Data			Adopted Budget This Year 2021-22	RESOURCE DESCRIPTION	Budget for Next Year 2022-23		
Actual		Proposed By Budget Officer			Approved By Budget Committee	Adopted By Governing Body	
Second Preceding Year 2019-20	First Preceding Year 2020-21						
				Beginning Fund Balance:			
1				1. Available cash on hand (cash basis) or			1
2	1,151,319	1,060,349	1,286,000	2. Net working capital (modified accrual basis)	1,528,000		2
3	21,557	25,868	43,934	3. Previously levied taxes estimated to be received	35,093		3
4	26,024	9,208	7,500	4. Interest	5,500		4
5				5. Transfer In from Sturgeon Lake Fund			5
6				6. OTHER RESOURCES			6
7				7.			7
8	32,674	69,080	48,750	8. Federal Funding	50,000		8
9	143,600	132,362	151,009	9. State Funding	184,557		9
10	30,000	5,500	30,000	10. Local/Regional Funding	20,000		10
11	16,290	-	-	11. Other Funding	-		11
12				12.			12
13				13.			13
14	16,748	14,826	27,890	14. Reimbursements & Misc	23,215		14
15				15			15
16				16			16
17				17			17
18				18			18
19				19			19
20				20			20
21				21			21
22				22			22
23				23			23
24				24			24
25				25			25
26				26			26
27				27			27
28				28			28
29	1,438,212	1,317,193	1,595,083	29. Total resources, except taxes to be levied	1,846,365	-	-
30			1,712,000	30. Taxes estimated to be received	1,912,000		
31	1,642,029	1,691,225		31. Taxes collected in year levied			
32	3,080,241	3,008,418	3,307,083	32. <b>TOTAL RESOURCES</b>	3,758,365	-	-

## General Fund Requirements

REQUIREMENTS SUMMARY								
FORM LB-30	BY FUND, ORGANIZATIONAL UNIT OR PROGRAM						West Multnomah SWCD	
				General Fund				
	Historical Data			EXPENDITURE DESCRIPTION	Budget for Next Year 2022-23			
	Actual		Adopted Budget This Year 2021-22		Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body	
	Second Preceding Year 2019-20	First Preceding Year 2020-21						
				PERSONNEL SERVICES				
1	1,269,916	1,278,300	1,443,268	1 Personnel Services	1,634,504			1
2				2				2
3				3				3
4				4				4
5				5				5
6				6				6
7	1,269,916	1,278,300	1,443,268	7 TOTAL PERSONNEL SERVICES	1,634,504	-	-	7
	<b>11.3</b>	<b>10.8</b>	<b>10.8</b>	<b>Total Full-Time Equivalent (FTE)</b>	<b>10.8</b>			
				MATERIALS AND SERVICES				
8	214,986	184,494	306,204	8 Operations	375,728			8
9	364,490	310,557	491,100	9 Conservation Programs & Services	549,223			9
10				10				10
11				11				11
12				12				12
13				13				13
14	579,476	495,051	797,304	14 TOTAL MATERIALS AND SERVICES	924,951	-	-	14
				CAPITAL OUTLAY				
15	-	-	18,650	15 Capital Outlay	40,000			15
16				16				16
17				17				17
18				18				18
19				19				19
20				20				20
21	-	-	18,650	21 TOTAL CAPITAL OUTLAY	40,000	-	-	21
				Interfund Transfer and Other				
22	170,500	(48,586)	-	22 Transfer Out / (In) Sturgeon Lake Special Fund	-	-	-	22
23				23				23
24			25,000	24 Reserved for Future Expenditures	25,000			24
25			50,000	25 General Operating Contingency	50,000			25
26	170,500	(48,586)	75,000	26 TOTAL TRANSFERS, RESERVES & CONTING.	75,000	-	-	26
27	2,019,892	1,724,765	2,334,222	27 TOTAL EXPENDITURES	2,674,455	-	-	27
28	1,060,349	1,283,653	972,861	28 UNAPPROPRIATED ENDING FUND BAL.	1,083,910			28
29	3,080,241	3,008,418	3,307,083	29 TOTAL	3,758,365	-	-	29



# Sturgeon Lake Fund

SPECIAL FUND						
FORM	RESOURCES AND REQUIREMENTS					
LB-10	Sturgeon Lake			West Multnomah Soil & Water Conservation District		
			(Fund)			
Historical Data			DESCRIPTION RESOURCES AND REQUIREMENTS	Budget for Next Year 2022-23		
Actual		Adopted Budget This Year 2021-22		Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
Second Preceding Year 2019-20	First Preceding Year 2020-21					
		1. See note below	RESOURCES			
			Beginning Fund Balance:			
1			1 Cash on hand (cash basis), or			1
2	130,013	89,696	2 Working Capital* (modified accrual basis)			2
3			3 Previously levied taxes estimated to be received			3
4	2,199	725	4 Earnings from temporary investments			4
5	170,500		5 Transfer In from General Fund			5
6	3,000	2,376	6 Project Grants and Contributions			6
7			7			7
8			8			8
9	305,712	92,797	9 Total Resources, except taxes to be levied			9
10			10 Taxes estimated to be received			10
11			11 Taxes collected in year levied			11
12	305,712	92,797	12. <b>TOTAL RESOURCES</b>			12
			MATERIALS AND SERVICES			
13	207,968	42,976	13 Contracted Services			13
14			14			14
15	207,968	42,976	15 <b>TOTAL MATERIALS AND SERVICES</b>			15
			CAPITAL OUTLAY			
16	8,048	1,235	16 Capital Outlay			16
17			17			17
18			18			18
19			19			19
20			20			20
21			21			21
22	8,048	1,235	22 <b>TOTAL CAPITAL OUTLAY</b>			22
			TRANSFERRED TO OTHER FUNDS			
23	-	48,586	23 Transferred to General Fund			23
24			24			24
25			25			25
26			26			26
27	-	48,586	27 <b>TOTAL TRANSFERS, RESERVES AND CONTINGENCIES</b>			27
28	216,016	92,797	28 <b>TOTAL EXPENDITURES</b>			28
29	89,696	-	29 <b>UNAPPROPRIATED ENDING FUND BALANCE</b>			29
30	305,712	92,797	30 <b>TOTAL REQUIREMENTS</b>			30

1. Sturgeon Lake Fund was eliminated in FY21 in accordance with ORS 294.353

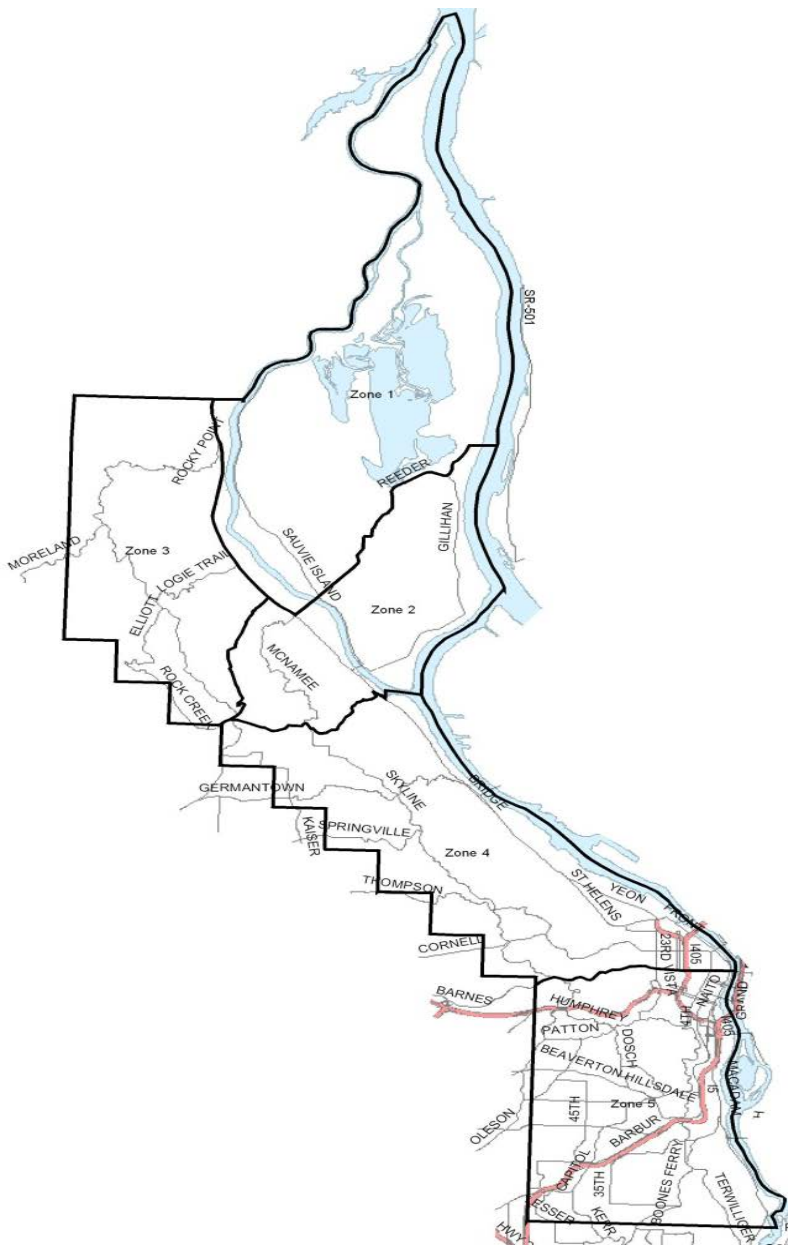
## Detailed Resources and Requirements

WEST MULTNOMAH SOIL & WATER CONSERVATION DISTRICT DETAILED RESOURCES AND EXPENDITURES	Administration & Communications & Outreach	Education	Forestry Programs	Habitats	Soil & Farms	Invasive Weeds Programs	Urban Programs	Proposed Budget General Fund (LB-20 & 30)
Beginning Balance	1,528,000							1,528,000
Previously Levied Taxes estimated to be rec'd	35,093							35,093
Earnings from temporary investments	5,500							5,500
Total before Grants, Prop, Taxes and Misc.	1,568,593	-	-	-	-	-	-	1,568,593
								-
Federal Funding (NRCS, NACD)			40,000		10,000			50,000
State Funding (ODA, OWEB, OSWB, OISC, ODF)	26,372	6,000	3,500	6,719	76,533	65,433		184,557
Local/Regional Funding (CREST, OWF)				-	20,000			20,000
Other Funding								-
Reimb & Misc & Contributions (workshops, cost-share, BES, Parks)	13,215						10,000	23,215
Total Other Resources	39,587	6,000		6,719	106,533	65,433	10,000	277,772
Taxes Estimated to be Received	1,912,000							1,912,000
All Resources less Beginning Balance	1,992,180	6,000	-	6,719	106,533	65,433	10,000	2,230,365
<b>Total Resources</b>	<b>3,520,180</b>	<b>6,000</b>	<b>-</b>	<b>6,719</b>	<b>106,533</b>	<b>65,433</b>	<b>10,000</b>	<b>3,758,365</b>
<b>Expenditures</b>								
Salaries & Wages	453,735	79,693	112,287	115,636	104,577	132,083	112,287	1,110,298
Insurance: Medical, Life, Vision, Dental	44,813	10,529	17,075	21,548	16,196	39,869	16,196	166,226
Worker's Comp	1,809	335	407	453	501	643	407	4,555
PERS	91,892	15,050	23,197	28,140	23,197	35,570	23,197	240,245
Payroll Taxes	46,252	8,124	11,446	11,788	10,660	13,464	11,446	113,180
<b>Total Personnel</b>	<b>638,502</b>	<b>113,731</b>	<b>164,412</b>	<b>177,566</b>	<b>155,131</b>	<b>221,630</b>	<b>163,533</b>	<b>1,634,504</b>
Forest Projects			48,520					48,520
Habitats				74,070				74,070
Soil & Farms					80,250			80,250
Urban Projects							28,950	28,950
Invasives Projects						99,733		99,733
Education Programs		18,400						18,400
Partner Funding		44,800		10,000		22,000	122,500	199,300
<b>Total Conservation Programs</b>	<b>-</b>	<b>63,200</b>	<b>48,520</b>	<b>84,070</b>	<b>80,250</b>	<b>121,733</b>	<b>151,450</b>	<b>549,223</b>
Events & Supplies	14,000							14,000
Printing/Production/Signage, Banners, Displays	4,500							4,500
Sponsorship of Community Events	3,700							3,700
LRBP Implementatin and messaging	3,750							3,750
Special Project (Website redesign)	25,000							25,000
Outreach and Translation Services	9,500							9,500
Website hosting, Media, Advertising, Marketing, Creative Services	7,380							7,380
<b>Communication &amp; Outreach Expenses</b>	<b>67,830</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>67,830</b>
Facilities (includes office space, storage facilities, employee parking)	66,000							66,000
Moving related expenses (one-time)	75,420							75,420
Computers/Maintenance (monthly support, software and add-ons)	20,657							20,657
Program related transportation (vehicles, gas, parking) & field supplies	22,648							22,648
Communications (Phone and Internet)	18,074							18,074
Insurance (general liab., auto, property, crime)	10,395							10,395
Membership & Profess. Organizational Dues	10,000							10,000
Office & meeting supplies (includes field supplies used across programs)	7,163							7,163
Professional Contracted Non-Employee Services (Audit, Bookkeeping)	21,200							21,200
Service and other fees (bank, payroll, notices)	8,891							8,891
Furniture / Office Equipment / Software	10,600							10,600
Real Estate Legal Services for Sturgeon Lake	16,000							16,000
TriMet option incentive for staff	2,400							2,400
Staff and Board Training	18,450							18,450
<b>Administrative Operating Expenses</b>	<b>307,898</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>307,898</b>
<b>Total Administrative and Communications Operations</b>	<b>375,728</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>375,728</b>
<b>Total Materials and Services Expenses</b>	<b>375,728</b>	<b>63,200</b>	<b>48,520</b>	<b>84,070</b>	<b>80,250</b>	<b>121,733</b>	<b>151,450</b>	<b>924,951</b>
Sturgeon Lake Stewardship Capital expenditures	10,000							10,000
IT and Vehicle / boat using grant funding	30,000							30,000
<b>Total Capital Outlay</b>	<b>40,000</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>40,000</b>
<b>Total Personnel, M&amp;S, Capital; Before SL Xfer, Conting, Reserves</b>	<b>1,054,230</b>	<b>176,931</b>	<b>212,932</b>	<b>261,636</b>	<b>235,381</b>	<b>343,363</b>	<b>314,983</b>	<b>2,599,455</b>
								-
General Operating Contingency	50,000							50,000
Reserve for Future Expenses or Economic Stabilization Reserve	25,000							25,000
<b>Total Transfers, Reserves and Contingencies</b>	<b>75,000</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>75,000</b>
<b>Total Expenditures</b>	<b>1,129,230</b>	<b>176,931</b>	<b>212,932</b>	<b>261,636</b>	<b>235,381</b>	<b>343,363</b>	<b>314,983</b>	<b>2,674,455</b>
<b>Ending Fund Balance Required</b>								
For minimum required months of operations funding								877,500
Reserve for Future Expenses or Economic Stabilization Reserve								125,000
Assigned to Sturgeon Lake Stewardship Account								81,410
<b>Total Ending Fund Balance Required</b>								<b>1,083,910</b>
<b>Total Requirements</b>								<b>3,758,365</b>

# APPENDIX A: SUPPLEMENTAL DISTRICT INFORMATION

## Geography and Service Area

The District's service area includes the portion of Multnomah County west of the Willamette River, all of Sauvie Island including the Columbia County portion of the Island, and a portion of the Bonny Slope region of the Tualatin Mountains in Washington County. 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. The population served is approximately 136,000.



- 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

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

### *Enabling and Governing Legislation*

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.

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.

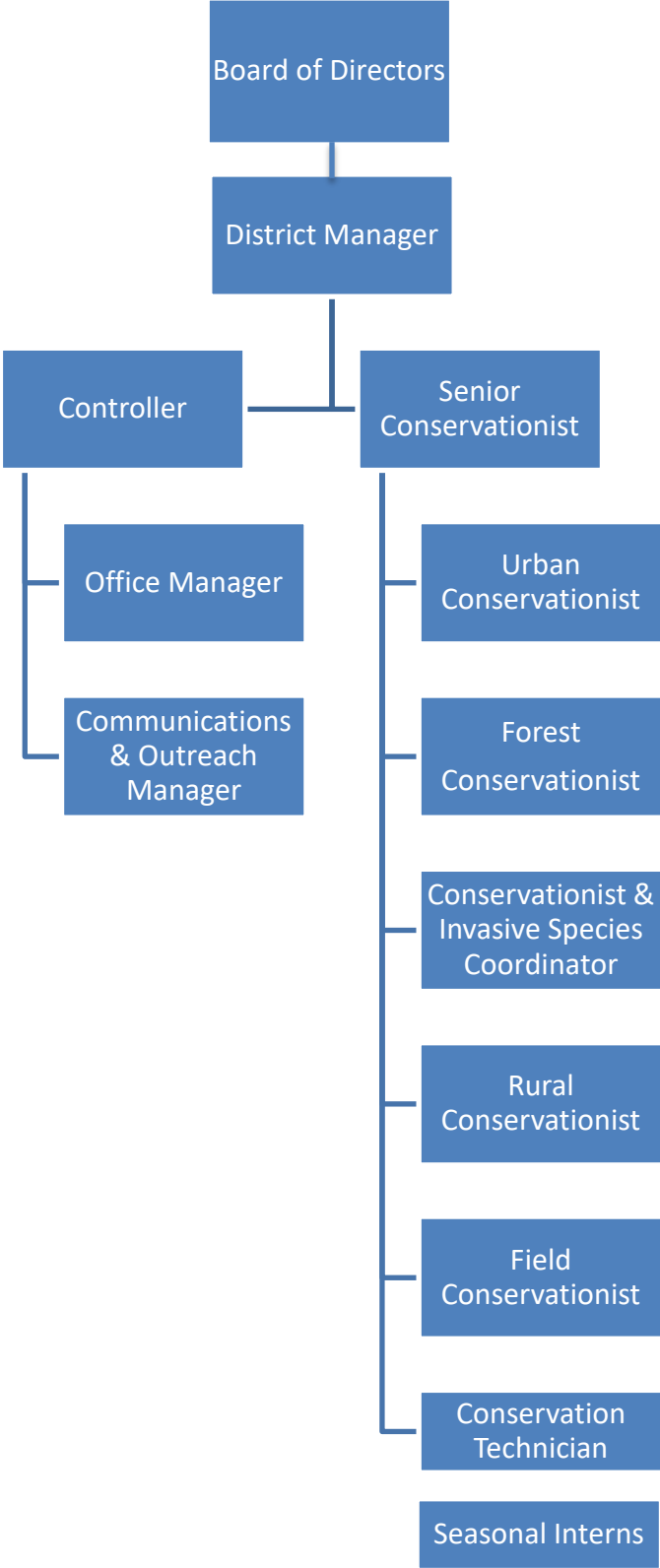
In addition to the general purpose of SWCDs under ORS 568.225 in the previous editions, the following was added: **“promote collaborative conservation efforts to protect and enhance healthy watershed functions, assist in the development of renewable energy and energy efficiency resources.”**

### *History*

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.

# APPENDIX B: ORGANIZATION CHART



## **District Staff**

The current permanent staff consists of the following positions. 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, grant funding pursuits, and overall program management.

### **Controller** – 1 FTE

This position is responsible for ensuring that the District meets all the legal and fiduciary requirements pertaining to public entities, including compliance with Local Budget Law, Oregon Public Contracting Law, Secretary of State audit requirements, and all other applicable laws and regulations. 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, human resources, and communications.

### **Communications & Outreach Manager** – .7 FTE

This position provides internal and external communications services for the District. This includes creating District marketing, branding and educational materials, including publications, newsletters, 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; and also manages signature annual workshops and events, the District website, and social media content.

### **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** – 1 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 supervision and 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, and Sturgeon Lake project maintenance. 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. This position also coordinates the Conservation District's K-12 and garden program.

### **Conservationist & 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.

### **Field Conservationist – 1 FTE**

This position provides assistance to conservationist/technical staff with field work, outreach efforts and data collection and management.

### **Conservation Technician – .85 FTE**

This position provides assistance to conservationist/technical staff with field work and data collection and management.

### **Seasonal Field and GIS Interns – .5 FTE**

These positions assist staff annually with planting and weed eradication fieldwork in the spring and fall and with GIS (Geographic Information System) data, database management, and technical analyses during the summer.

## APPENDIX C: ACRONYMS

AWQMP	Agriculture Water Quality Management Program
BES	Bureau of Environmental Services
BMP	Best Management Practices
COLA	Cost-of-living Adjustment
CPI	Consumer Price Index
CREST	Columbia River Estuary Study Taskforce
CWMA	Cooperative Weed Management Area
DEI	Diversity, Equity and Inclusion
DEQ	Department of Environmental Quality (Oregon)
DSL	Department of State Lands (Oregon)
ECO	Ecology in Classrooms & Outdoors
EDRR	Early Detection Rapid Response
EQIP	Environmental Quality Incentives Program
ESA	Endangered Species Act (Federal)
EWP	Emergency Watershed Protection Program
FPC	Forest Park Conservancy
FTE	Full Time Equivalent Employee (2080 hours/year)
GAAP	Generally Accepted Accounting Principles
GASB	Governmental Accounting Standards Board
GFOA	Government Finance Officers Association
GIS	Geographic Information Systems
HEL	Highly Erodible Land
HRA VEBA	Health Reimbursement Arrangement Voluntary Employees' Beneficiary Association
IT	Information Technology
LAC	Local Advisory Committee
LB Forms	Local Budget Forms
LGIP	Local Government Investment Pool
LMA	Local Management Agency (Oregon SBI010)
LRBP	Long-Range Business Plan
MOU	Memorandum of Understanding
NACD	National Association of Conservation Districts
NMFS	National Marine and Fisheries Service
NOAA	National Oceanic and Atmospheric Administration
NRCS	Natural Resources Conservation Service
NWMP	Northwest Weed Management Partnership
OACD	Oregon Association of Conservation Districts
OAR	Oregon Administrative Rule
OCEAN	Oregon Conservation Employees Association Network
ODA	Oregon Department of Agriculture
ODFW	Oregon Department of Fish and Wildlife
OFRI	Oregon Forest Resources Institute
ORS	Oregon Revised Statute
OSU	Oregon State University



OSWB	Oregon State Weed Board
OWEB	Oregon Watershed Enhancement Board
PERS	Public Employees' Retirement System
PIT	Passive Integrated Transponder
SBWC	Scappoose Bay Watershed Council
SDAO	Special Districts Association of Oregon
SWCC	Soil and Water Conservation Commission
SWCD	Soil and Water Conservation District
TALMA	Technical Assistance Local Management Agency
TCWC	Tryon Creek Watershed Council
TSCC	Tax Supervising & Conservation Commission
USDA	United States Department of Agriculture
USFS	United States Forest Service
WRC	Westside Watershed Resource Center
WRP	Wetland Reserve Program
WWRP	West Willamette Restoration Project