



WEST MULTNOMAH
Soil & Water Conservation District

Adopted Budget Fiscal Year 2022-2023

Portland, Oregon

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

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GOVERNMENT FINANCE OFFICERS ASSOCIATION

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**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.

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.

SECTION I: BUDGET MESSAGE

July 1, 2022

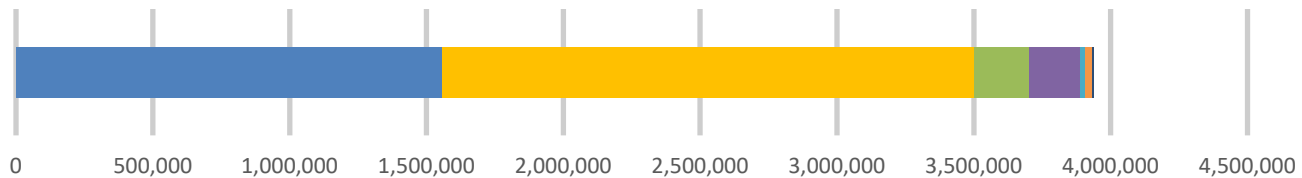
To West Multnomah Soil & Water Conservation District Stakeholders:

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 budget is \$3,936,365, an increase of \$629,282, primarily due to a higher beginning fund balance and higher property tax revenues compared to the prior year budget.

FY23 Fiscal Year General Fund Resources (\$3,936,365)



- Beginning Fund Balance
- Property Taxes
- Federal Funding
- State Funding
- Local and Other Funding
- Miscellaneous
- Interest

Type	FY 22	FY 23	Comparison of FY23 to FY22	
			Increase / (Decrease)	%
Beginning Fund Balance	1,286,000	1,556,000	270,000	21
Property Taxes	1,755,934	1,947,093	191,159	11
Federal Funding	48,750	200,000	151,250	310
State Funding	151,009	184,557	33,548	22
Local and Other Funding	30,000	20,000	(10,000)	(33)
Miscellaneous	27,890	23,215	(4,675)	(17)
Interest	7,500	5,500	(2,000)	(27)
Total	3,307,083	3,936,365	629,282	19

Our beginning fund balance of \$1,556,000, representing 40% of total resources, is \$270,000 or 21% 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 projects. 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 49% 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 assumptions 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

<u>Assessed Value (AV)</u>	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
Total All Counties	22,556,900,311		23,995,686,975		24,891,548,868		27,536,272,528			28,661,400,000
<u>Taxes Extended (TE)</u>	2019		2020		2021		2022		Amount	
									Rate	(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
Total All Counties	1,699,922		1,803,174		1,870,357		2,064,000			2,148,000
<u>Compression¹</u>	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
Total All Counties	69,525		82,447		97,738		98,718			102,500
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 upon 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 two grants highlighted blue in the table (NACD Technical Assistance and ODA TALMA) are secured and support staff labor and projects already in place. The USDA Farm Service Agency grant of \$100,000 and the USDA Partnerships for Climate-Smart Commodities grant of \$50,000 were both added to our budget subsequent to the proposed budget being approved at our Budget Committee meeting. In the intervening two months, from April to June, we were able to gain assurances that this new USDA funding would be available to us in FY23.

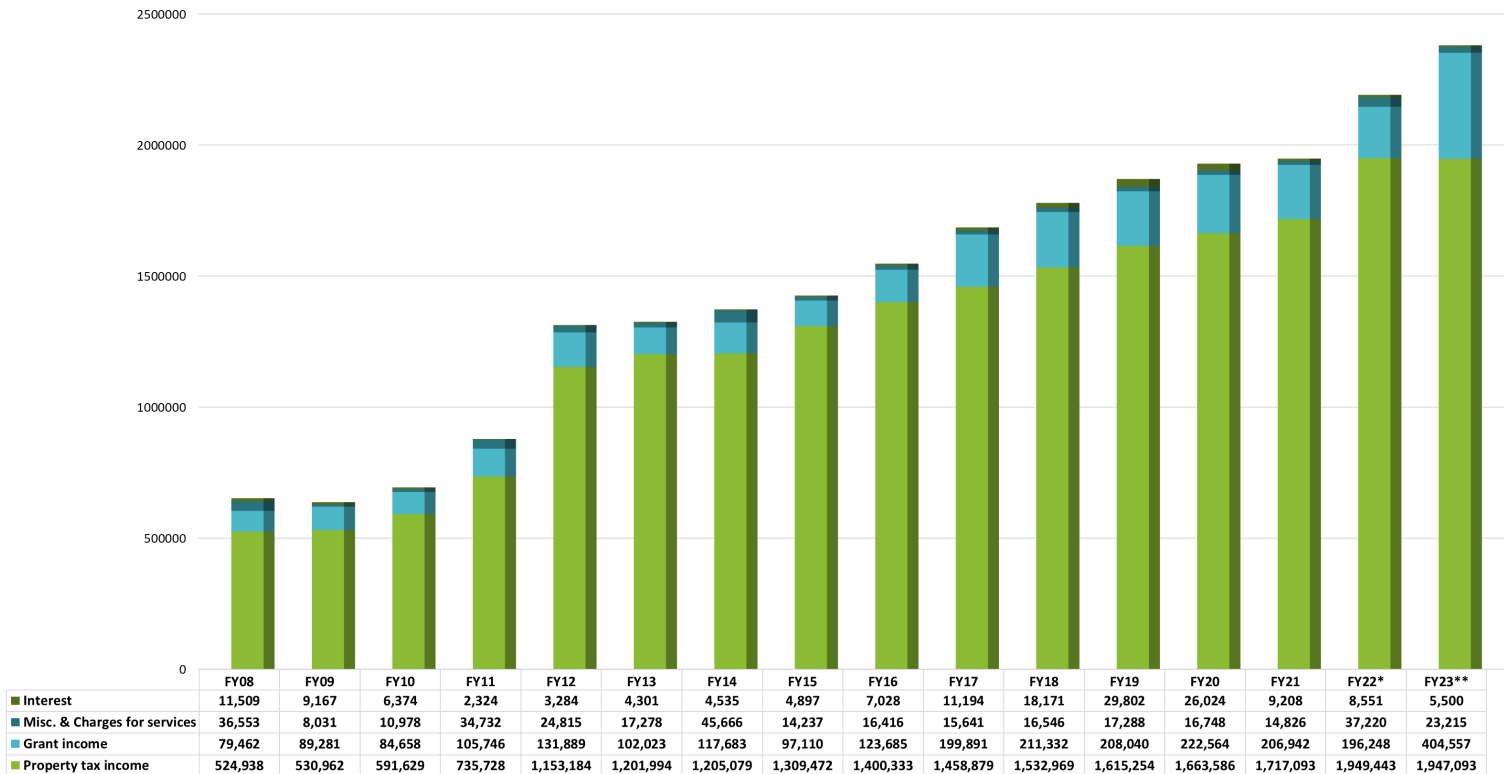
GRANTS AND OTHER RESOURCES		FY22	FY23	Increase/ (Decrease)	%	Funding Description
Federal	NRCS & NACD Partnership ¹	48,750	50,000	1,250	3	NACD Technical Assistance Grant to expand NRCS rural conservation capacity in forestry, agricultural and habitat restoration programs.
	USDA Farm Service Agency	-	100,000	100,000	new	People's garden initiative to teach how to grow food and garden using conservation practices and nurture habitat for pollinators and wildlife.
	USDA Partnerships for Climate-Smart Commodities	-	50,000	50,000	new	Initiative to promote climate-friendly practices of cover crops, low/no-till, nutrient management, etc. among farmers.
	Sub-total	48,750	200,000	151,250	310	
State	ODA TALMA Rural ¹	87,902	87,902	-	-	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	41,722	28,722	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	
Local	CREST	30,000	-	(30,000)	-	Lower McCarthy Creek Enhancement project in FY22, not repeating in FY23.
Other	PP&R, BES, workshops attendees, misc.	27,890	23,215	(4,675)	(17)	Projected partner contributions to VWRP and registration fees for workshops and training provided by the District.
Total		\$257,649	\$427,772	\$170,123	66	

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

Revenue Trend

The above discussion of our resources compares the FY23 budget to the FY22 budget. The graph below shows the trend of our actual revenues since FY2008, when our property tax levy began. Note that FY22 reflects our forecasted actual (*) and FY23 (**) reflects our budget. Our revenue trend continues to be positive, with a greater focus on grant funding going forward. Also see our [Five-Year Financial Forecast](#).

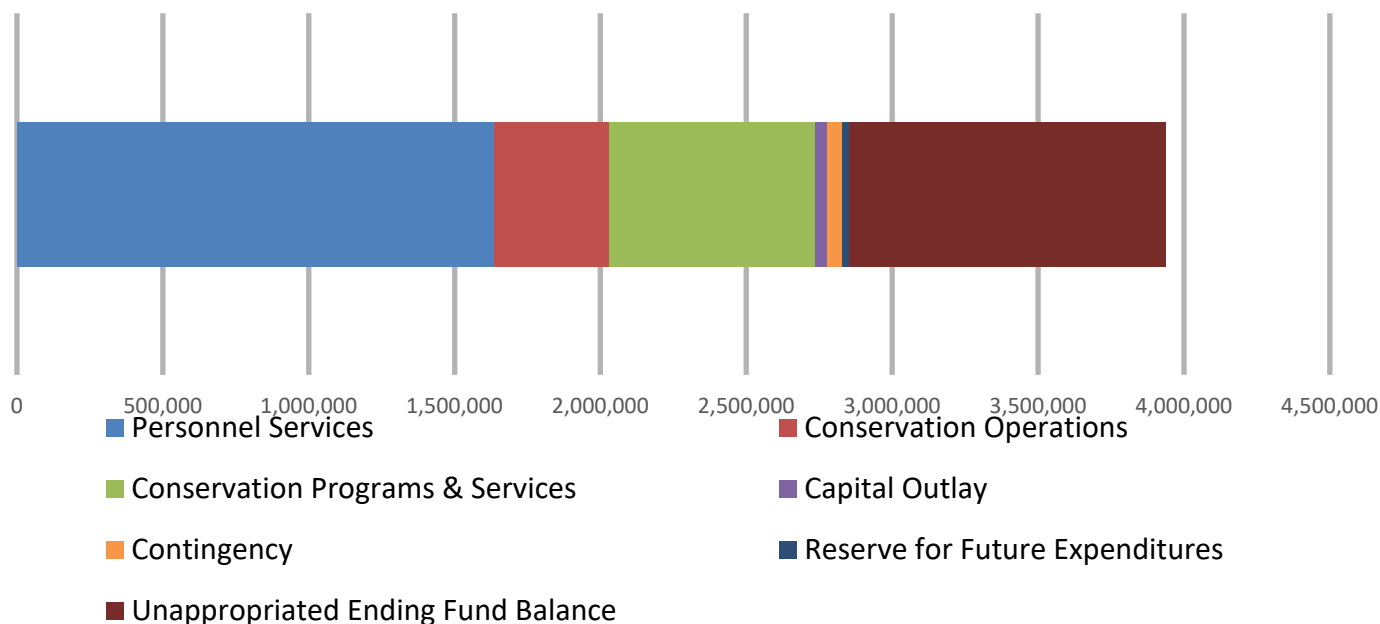
REVENUE: 2008 - 2023**



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 (\$3,936,365)



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	395,728	89,524	29
Conservation Programs & Services	491,100	707,223	216,123	44
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
Total	3,307,083	3,936,365	629,282	19

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 (LRBP).

Our budget recognizes these priorities in multiple ways. We're hiring a new field conservationist, a position that has been open throughout FY22, and we will be replacing the recently departed head of our agency, our District Manager, making sure in both cases that our budget reflects compensation and benefits that are competitive. 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 property tax revenue and expanding grant funding.

For more details on what will guide us in FY23 and further, see our detailed [LRBP on our website](#) or the full document attached to our adopted budget. The LRBP will guide the District's conservation work, and integrated with that work is our commitment to financial sustainability, organizational health, and taking action that leads to increased diversity, equity, and inclusion outcomes for all.

Our financial sustainability work within the long-range business planning has created a shared vision for our District that will balance our long-term goals with our short-term needs. We'll use best practices in budgeting and long-term forecasting, working to enhance revenues, contain costs, and allocate resources strategically.

Our organizational health work will complement our financial sustainability work by ensuring we are operating as effectively and efficiently as possible, while also focusing on the wellbeing of our most important asset, our staff; additionally, we'll be putting in place a continuity plan to ensure successful ongoing operations in the event of a disaster or loss of key personnel.

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
Personnel services	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
Materials & services: Administrative Operations	306,204	395,728	89,524	29	Increase due to relocation to new office and storage space (moving, infrastructure buildout, rent overlap) and contracted services to help with short staffing, partially offset by decrease in office rental and printing expenses
Materials & services: Conservation Programs	491,100	707,223	216,123	44	Primarily due to an increase in grant-supported conservation work; see details below
Capital outlay	18,650	40,000	21,350	114	Increase due to grant supported aquatic weed survey boat and website infrastructure buildout
Contingency	50,000	50,000	-	-	Amount consistent with prior years and considered prudent
Reserve for future expenditures	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
Unappropriated ending fund balance	972,861	1,083,910	111,049	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
Total	3,307,082	3,936,365	629,283	19	

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 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:

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

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 collaborating 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 are expenses 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 and other professional 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 \$395,728 for Operations Supporting Conservation Programs increased by \$89,524, or 29%, from the FY22 budget of \$306,204. This increase is due to the amount budgeted for all costs associated with our office relocation and contracted services to help with short staffing, slightly offset by a decrease in office rental expense going forward and no planned reprinting of our Meadow-scaping book in FY23. Our current office lease expires on 9/30/22, and a new office space has been identified and lease negotiations are in process. 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.

Materials and Services – Conservation Programs

The remaining Materials and Services costs are dedicated to conservation programs and services and represent 64% 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.

Conservation Area	FY 22	FY 23	Increase / (Decrease)	%	Reason for Change
Soil and Farms	35,650	80,250	44,600	125	Increase for grant funded habitat restoration projects on Sauvie Island farms.
Habitats	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.
Forests	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.
Urban	22,450	186,950	164,500	733	Increase due to costs associated with two new grants: USDA Farm Service Agency's People's Garden initiative to teach how to grow food and to garden using conservation practices and nurturing habitat for pollinators and wildlife; and USDA Partnerships for Climate-Smart Commodities initiative to promote climate-friendly practices using cover crops, low/no-till, nutrient management, etc. among farmers.
Invasive Species	88,300	99,733	11,433	13	Increase due to Willamette Confluence & Sauvie Island Aquatic Weed Control grant funded work.
Education	10,500	18,400	7,900	75	Increase due to program redesign to focus on community-supported and desired gardens.
Partner Support	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.
Total	491,100	707,223	216,123	44	

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

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 funds for a grant-supported new boat for aquatic weed surveying, capitalizable costs related to the infrastructure buildout of a new website, a used vehicle, and 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. If the need should arise to borrow funds, the District is legally authorized by Oregon Revised Statute chapter 287A to issue bonds and take on other forms of debt.

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.

Much recognition is due our staff members, who have all devoted their expertise, time, and energy into the development of the budget and will be effectively administering their program budgets throughout FY23. We are also fortunate to have an engaged and knowledgeable Budget Committee. Finally, our board members guide us with their passion and dedication; they are instrumental in ensuring our budget is well vetted and aligned with our mission and vision.

Sincerely,

Michele Levis

Michele Levis, CPA
Controller and Budget Officer
West Multnomah Soil & Water Conservation District

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. Our metrics are summarized in the table below, with the trend graph shown in the applicable section where our operations are discussed.

Trends and Performance Measures

FISCAL YEAR TOTAL

Metrics	2015- 2016 Actual	2016- 2017 Actual	2017- 2018 Actual	2018- 2019 Actual	2019- 2020 Actual	2020- 2021 Actual	2021- 2022 Work Plans	2022- 2023 Goals
Conservation Plans Completed	34	39	32	27	12	12	25	26
Acres Treated for Invasive Plants	237	129	46	47	88	79	80	82
Acres of Native Habitat Enhanced	281	251	257	236	146	183	265	273
Acres of Cropland Improved through Soil Health Practices	-	38	25	47	47	34	240	247
Native Plants Installed	150,004	55,623	30,985	69,926	43,123	18,964	25,000	25,750
Linear Feet of Streams/Banks Enhanced	28,261	46,090	36,254	30,826	31,311	25,882	30,000	30,900
People Served at Outreach Events	3,585	1,237	2,550	3,370	1,682	660	3,300	3,399
Public Engagement Meetings Held (Board Meetings, DEI Meetings, Annual Meeting)	15	17	17	17	18	19	19	20
Partner Support and Spending to Leverage Conservation Efforts	\$100,300	\$103,230	\$107,725	\$135,145	\$141,025	\$151,733	\$167,491	\$199,300

Our Operations

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

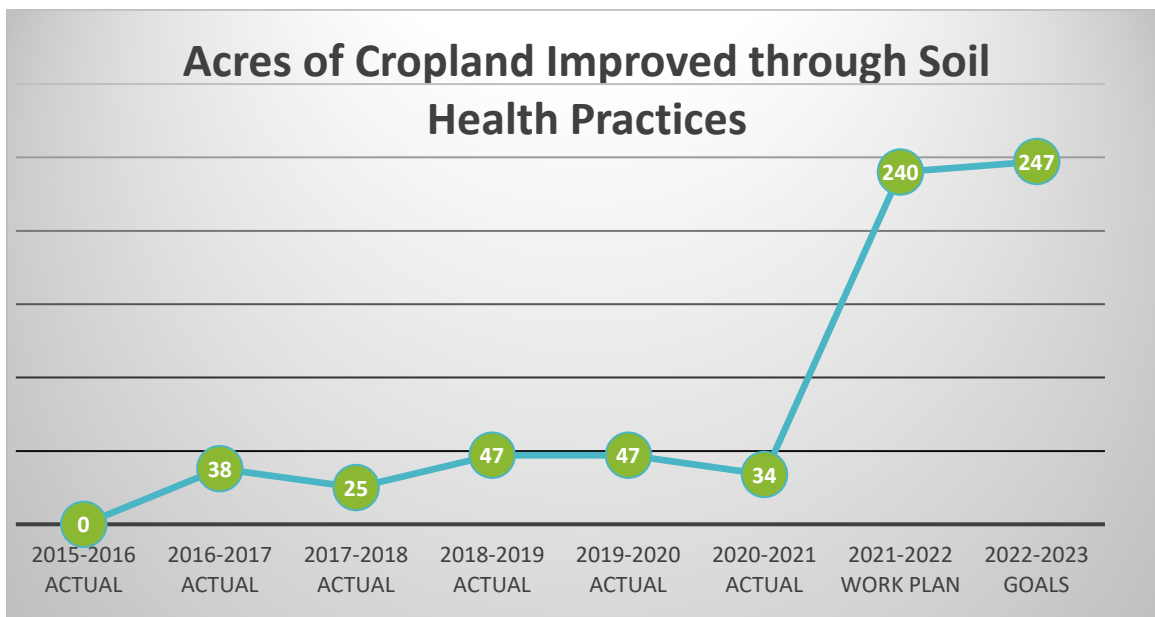
Conservation Planning

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

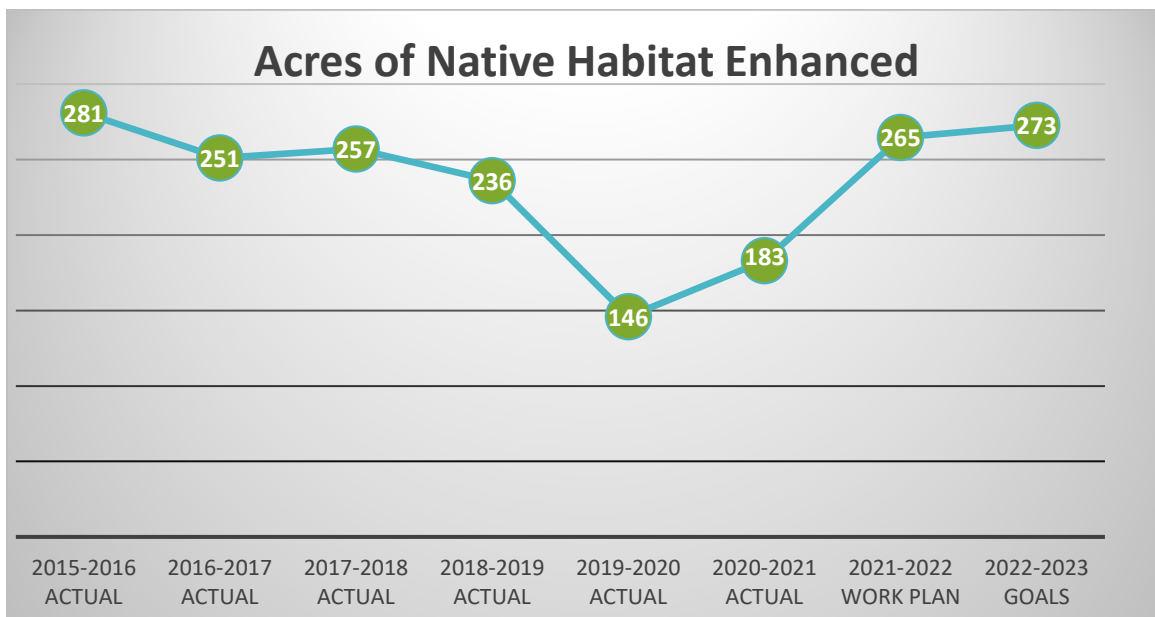
The District partners with the U.S. Department of Agriculture's Natural Resources Conservation Service (NRCS), the Oregon Department of Agriculture (ODA) and Oregon State University (OSU) Extension Service to provide farmers the education, technical and financial assistance for preventing soil erosion, 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 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.

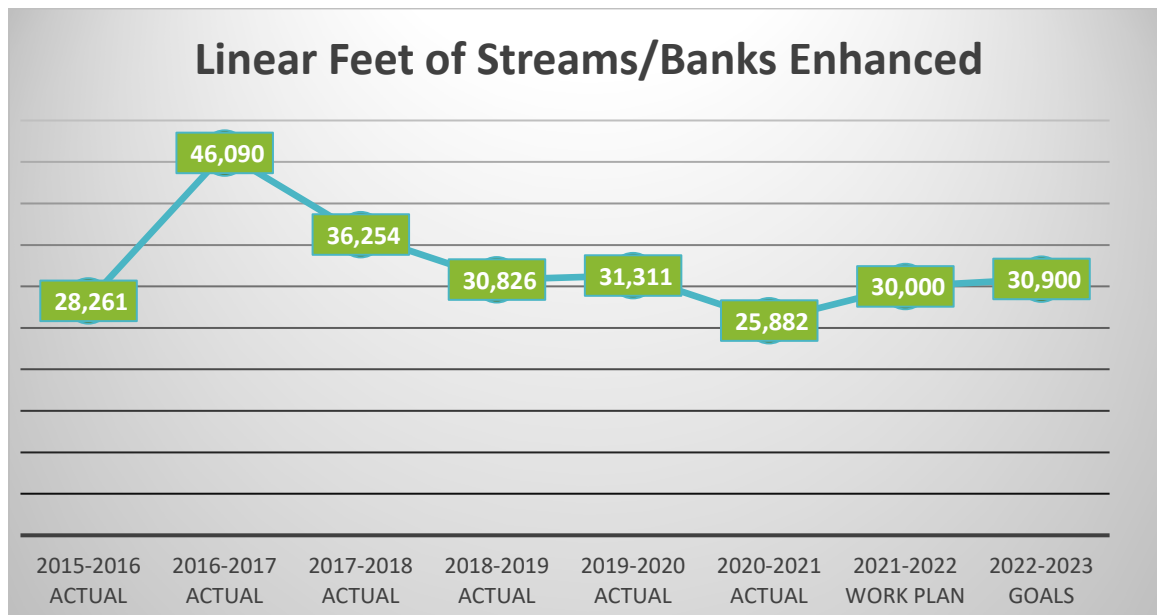
The District assists private landowners by helping them to enhance their wetland habitats, including floodplain, emergent wetland, wet prairie, off-channel habitat for salmon, and large ponds. The District and our partner, the Columbia River Estuary Study Taskforce (CREST), are also assisting with ongoing 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 meadow-scape areas. 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

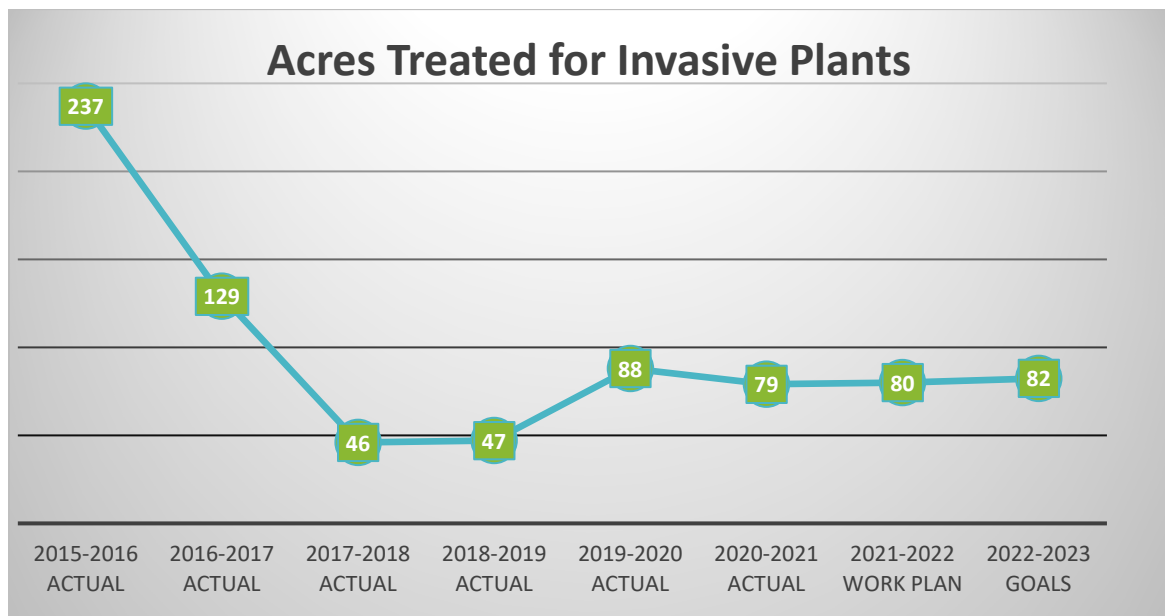
The District works with people including residential homeowners, renters, homeowner associations, commercial land managers, and educational institutions to develop and implement conservation plans within priority watersheds (see page 36 of the [LRBP](#)). These conservation plans are focused on invasive 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.

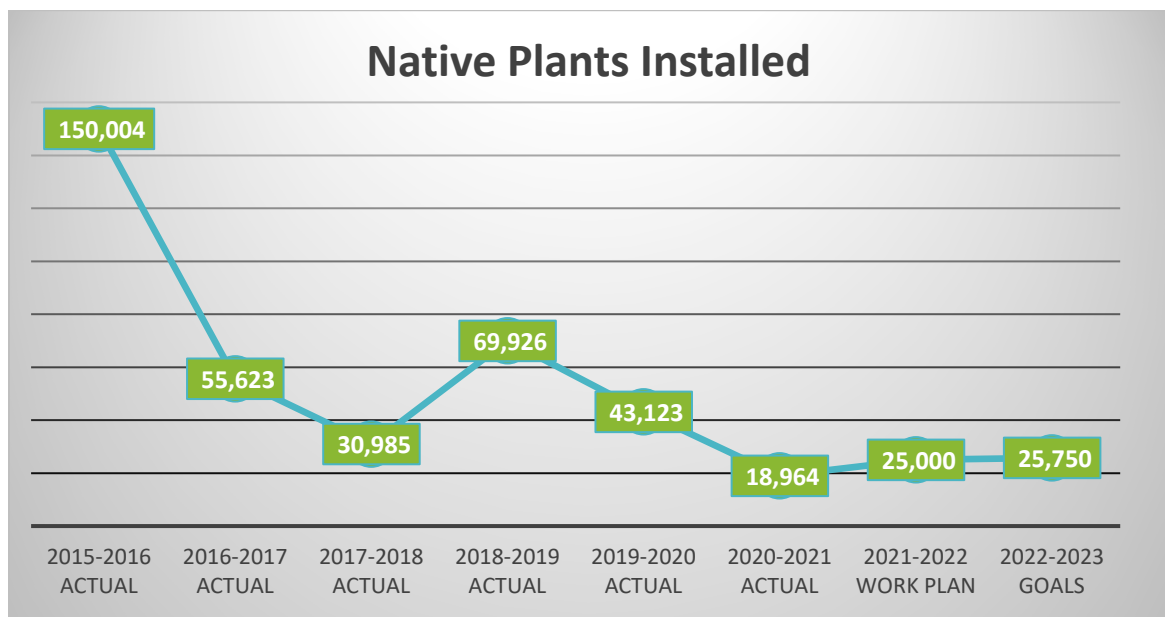
For both terrestrial and aquatic weeds, the goal is to avoid introductions through prevention and eradicate where possible in the event of an introduction. If eradication is not possible, our goal is to contain or slow the spread of these weeds. This management strategy is designed to limit the spread 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

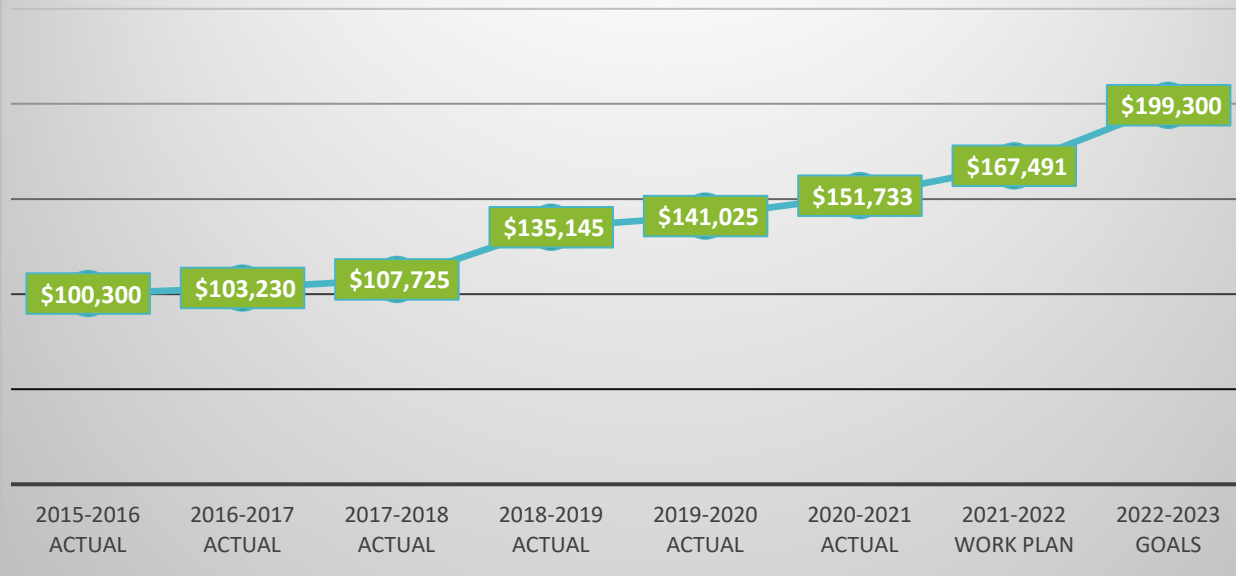
Situated between the Columbia River and Multnomah Channel the 3,200 acres of Sturgeon Lake forms the core of the Sauvie Island Wildlife Area managed by the Oregon Department of Fish and Wildlife (ODFW). Sturgeon Lake is important habitat for salmon, sturgeon, and Pacific lamprey, and is an integral part 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. Some of our longer-term partnerships are described below.

Partner Support and Spending to Leverage Conservation Efforts



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 providing 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.

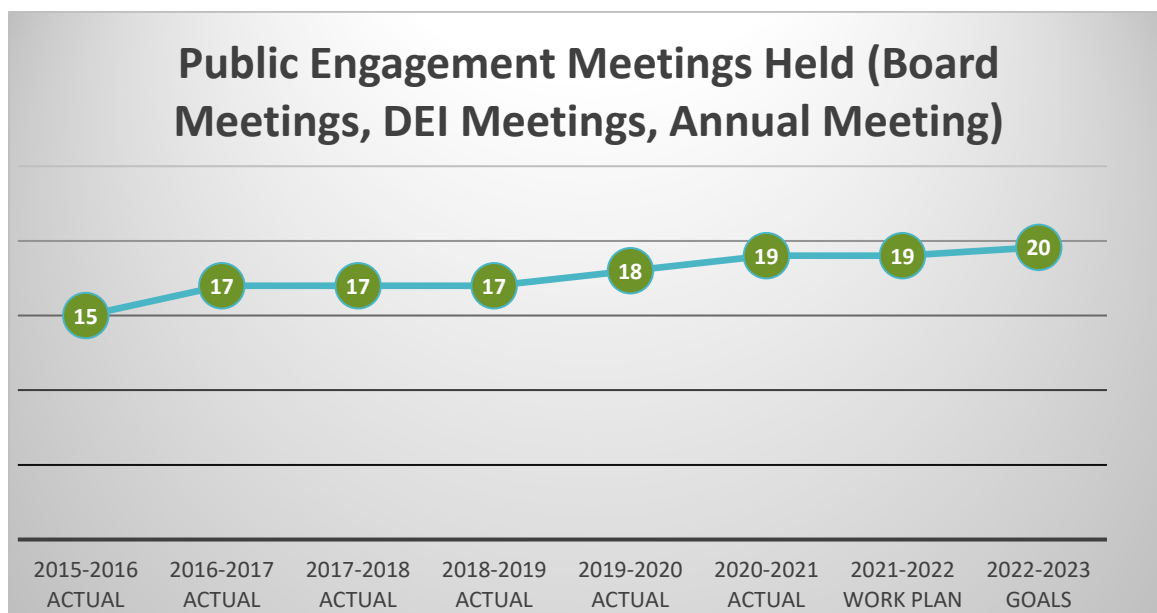
A new area added to the LRBP is to identify the types of agreements we should use to secure conservation benefits from our projects and actions for the long-term. One initiative that the District will be working on in FY23 is investigating how to protect in perpetuity the multiple years of conservation investment in the SW 25th 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 25th 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.

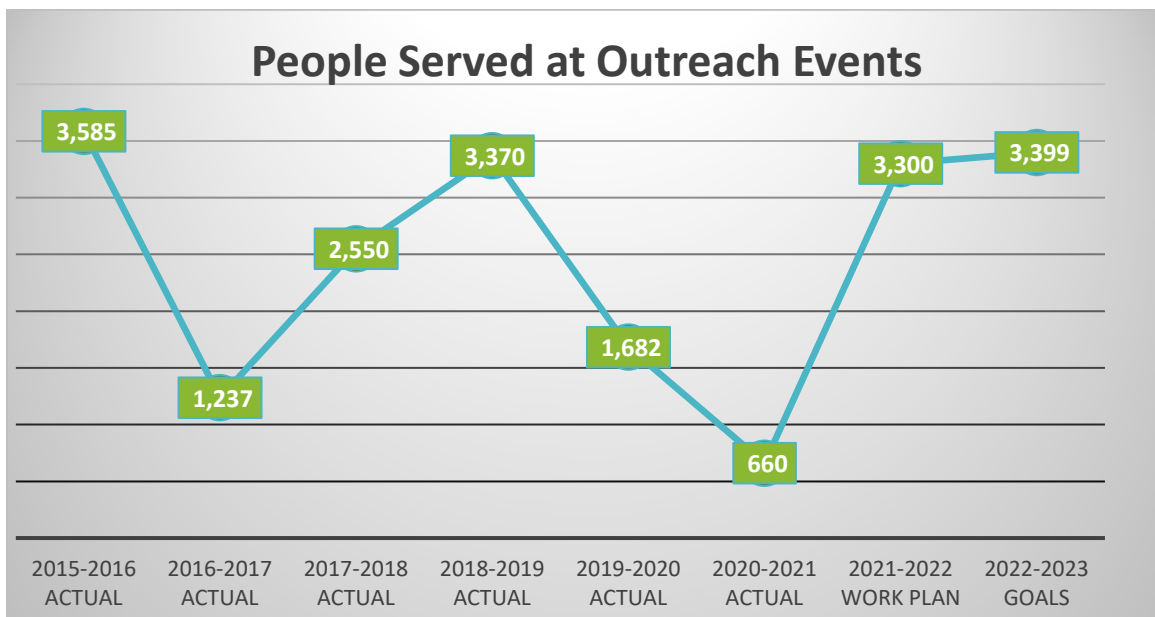
A second initiative is working with the Forest Park Conservancy on a model conservation easement program for forested properties in the Greater Forest Park Ecosystem. Many landowners have expressed interest in donating easements to the Forest Park Conservancy and the District has developed a model where 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 an excellent 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.

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).

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 innovative ideas and perspectives to be part of the Committee's deliberations.

Name	Position	Status
Rachel Dvorsky	Elector	Term expires 12/31/24
Laura Foster	Elector	Term expires 12/31/23
Genevieve Fu	Elector	Term expires 12/31/23
April Gutierrez	Elector	Term expires 12/31/23
Jan Hamer	Elector	Term expires 12/31/22
Xuan Sibell	Elector	Term expires 12/31/24
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 many 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. Certain 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
Confirm budget committee members and solicit new public members if necessary	The budget committee is composed of the elected governing board and an equal number of electors appointed by the governing body.	December and January
Post notice of Budget Committee openings (if any) on website and other media	There is not a specific requirement to publish/post, but it is helpful for recruiting public members.	January
Prepare Budget Calendar	Calendar posted on website and sent to the Tax Supervising & Conservation Commission (TSCC).	1/11/2022
Appoint Budget Officer by resolution at Board Meeting	Required by ORS 294.331. Controller to serve as Budget Officer.	2/15/2022
Appoint (if applicable) new public members of Budget Committee at Board Meeting	Budget Committee consists of all Board members plus an equal number (7) of public members.	2/15/2022 or 3/15/2022
Publish Notice of Budget Committee Meeting	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
Publish 2nd Notice of Budget Committee Meeting	At least 10 days prior to the meeting. The second notice can be published on our website. It does not need to be published in a newspaper a second time.	3/22/2022
Prepare Proposed Budget and Budget Message	Prepared by Budget Officer. Post on Website and send link to Budget Committee Members.	4/18/2022
Budget Committee Meeting 1	Public Comments taken at this time.	4/19/2022
Budget Committee Meeting 2	Second meeting, if necessary, to approve budget.	4/26/2022
File Approved Budget with TSCC	At least 30 days before Budget Hearing and no later than May 15th; TSCC reviews and prepares Certification Letter.	5/15/2022
Publish Notice of Budget Hearing	To be published in widely distributed newspaper 5 to 30 days before hearing.	5/20/2022
Budget Hearing	For acceptance of Public Comment on the Budget.	6/21/2022
Enact Resolutions	Adopt budget, make appropriations, impose & categorize tax by June 30. These may be adopted the same day as the Budget Hearing, but it's possible to delay adoption, if necessary, to consider any public testimony given at the Hearing and make appropriate adjustments.	6/21/2022
File Adopted Budget with TSCC	Due within 15 days of adoption. Include response, if applicable, to Certification Letter.	7/5/2022
Submit resolutions and tax certification documents to County Assessor's Office	Copies must be sent to Multnomah, Columbia, and Washington Counties by July 15.	7/15/2022
File copies of budget with County Clerk	Copies must be sent to TSCC (in lieu of Multnomah County), Columbia and Washington Counties by September 30.	9/30/2022

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	Adopted Budget	% Change
REVENUES:														
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	11%
Grant income	199,891	62%	211,332	6%	208,040	-2%	222,564	7%	206,942	-7%	229,759	11%	404,557	76%
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	-17%
Interest	11,194	59%	18,171	62%	29,802	64%	26,024	-13%	9,208	-65%	7,500	-19%	5,500	-27%
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%	2,380,365	18%
EXPENDITURES:														
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	13%
Materials and services	695,137	14%	641,885	-8%	587,720	-8%	579,476	-1%	495,051	-15%	797,304	61%	1,102,951	38%
Capital outlay	22,696	447%	7,200	-68%		-100%	-	-	-	-	18,650	-	40,000	114%
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%	2,777,455	23%
Transfer to/(from) Sturgeon Lake Fund					21,729		170,500	685%	(48,586)	-128%	-		-	
Reserve for Future Expenditures											25,000	-	25,000	0%
Contingency	-		-		-						50,000	-	50,000	0%
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%	2,852,455	22%
Change in fund balances	13,321		62,724		133,299		(90,970)		223,304		(313,139)		(472,091)	
Fund balance, beginning of year	941,975		955,296		1,018,020		1,151,319		1,060,349		1,286,000		1,556,000	
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%	1,083,909	11%
Months of Operating Expenditures	6.9		7.1		8.1		6.9		8.7		5.2		4.7	

Five-Year Financial Forecast

The District prepares financial forecasts reflecting our long-range business plan on an ongoing basis, considering 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 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 to replenish its Stewardship Account.

For the Year Ended:	FY22		FY23		FY24		FY25		FY26		FY27		FY28	
	Adopted Budget	Change	Adopted Budget	% Change	Forecast	% Change	Forecast	% Change	Forecast	% Change	Forecast	% Change	Forecast	% Change
REVENUES:														
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	11%	404,557	76%	465,241	15%	535,027	15%	615,281	15%	707,573	15%	778,330	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	88%	23,215	-17%	23,447	1%	23,682	1%	23,918	1%	24,158	1%	24,399	1%
Interest	7,500	-19%	5,500	-27%	5,555	1%	5,611	1%	5,667	1%	5,723	1%	5,781	1%
Total revenues	2,021,083	4%	2,380,365	18%	2,549,219	7%	2,680,344	5%	2,823,766	5%	2,981,109	6%	3,118,857	5%
EXPENDITURES:														
Personnel services	1,443,268	13%	1,634,504	13%	1,650,849	1%	1,667,358	1%	1,684,032	1%	1,700,872	1%	1,717,881	1%
Materials and services	797,304	61%	1,102,951	38%	932,951	1%	932,951	0%	932,951	0%	932,951	0%	932,951	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	27%	2,777,455	23%	2,588,800	-7%	2,605,309	1%	2,621,982	1%	2,638,823	1%	2,655,831	1%
Transfer to/(from) Sturgeon Lake 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	35%	2,852,455	22%	2,663,800	-7%	2,680,309	1%	2,696,982	1%	2,713,823	1%	2,730,831	1%
Change in fund balances	(313,139)		(472,091)		(114,581)		36		126,784		267,286		388,025	
Fund balance, beginning of year	1,286,000		1,556,000		1,083,909		969,328		969,364		1,096,148		1,363,434	
Fund balance, end of year	972,861	-24%	1,083,909	11%	969,328	-11%	969,364	0%	1,096,148	13%	1,363,434	24%	1,751,459	28%
Months of Operating Expenditures	5.2		4.7		4.5		4.5		5.0		6.2		7.9	

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 FY20 and FY21 audited financial results, FY22 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. In FY23 as in FY22, the District has 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 (Form LB-1), 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.

Notice of Budget Hearing

FORM LB-1		NOTICE OF BUDGET HEARING	
<p>A public meeting of the West Multnomah Soil & Water Conservation District will be held virtually via Zoom on June 21, 2022, at 6:00 PM. Attend by emailing info@wmswcd.org with the subject line "Request for Zoom access code" or by calling 503-238-4775 and leaving a voicemail message at extension 100, no later than 5:00 PM on 6/21/22. The purpose of this meeting is to discuss the budget for the fiscal year beginning July 1, 2022, as approved by the West Multnomah SWCD Budget Committee. A summary of the budget is presented below. A copy of the budget may be inspected online at www.wmswcd.org or by emailing info@wmswcd.org to request a copy. This budget is for an annual budget period. This budget was prepared on a basis of accounting that is the same as the preceding year.</p>			
Contact: M.Levis		Telephone: 503-238-4775	Email: info@wmswcd.org
FINANCIAL SUMMARY - RESOURCES			
TOTAL OF ALL FUNDS	Actual Amount 2020-21	Adopted Budget This Year 2021-22	Approved Budget Next Year 2022-23
Beginning Fund Balance/Net Working Capital	1,150,045	1,286,000	1,528,000
Federal, State and All Other Grants, Gifts, Allocations and Donations	209,318	229,759	254,557
Interfund Transfers	48,586	0	0
All Other Resources Except Current Year Property Taxes	24,759	79,324	63,808
Current Year Property Taxes Estimated to be Received	1,717,093	1,712,000	1,912,000
Total Resources	3,149,801	3,307,083	3,758,365
FINANCIAL SUMMARY - REQUIREMENTS BY OBJECT CLASSIFICATION			
Personnel Services	1,278,300	1,443,268	1,634,504
Materials and Services	538,027	797,304	924,951
Capital Outlay	1,235	18,650	40,000
Interfund Transfers	48,586	0	0
Contingencies	-	50,000	50,000
Reserved for Future Expenditures	-	25,000	25,000
Unappropriated Ending Fund Balance	1,283,653	972,861	1,083,910
Total Requirements	3,149,801	3,307,083	3,758,365
FINANCIAL SUMMARY—REQUIREMENTS AND FULL-TIME EQUIVALENT EMPLOYEES (FTE) BY ORGANIZATIONAL UNIT OR PROGRAM			
Name of Organizational Unit or Program			
FTE for that unit or program			
Conservation District Program	1,773,351	2,259,222	2,599,455
FTE	10.8	10.8	11.3
Sturgeon Lake Restoration Program	92,797	0	0
FTE	0.0	0.0	0.0
Not Allocated to Organizational Unit or Program	1,283,653	1,047,861	1,158,910
FTE	0.0	0.0	0.0
Total Requirements	3,149,801	3,307,083	3,758,365
Total FTE	10.8	10.8	11.3
STATEMENT OF CHANGES IN ACTIVITIES and SOURCES OF FINANCING			
<p>Our resources in FY23 compared to FY22 will increase by \$451,282. Of this amount, \$242,000 is due to a higher beginning fund balance, which is the result of COVID-19-driven lower than planned expenditures in FY22, and \$200,000 is due to an increase in Property Tax Revenue. Personnel Services requirements will increase by \$191,236 due to inflationary adjustments to wages and increased health and retirement benefits. Materials and Services will increase by \$127,647 due to inflationary pressures and one-time spending related to a new website design and to office relocation costs.</p>			
PROPERTY TAX LEVIES			
	Rate or Amount Imposed	Rate or Amount Imposed	Rate or Amount Approved
Permanent Rate Levy (rate limit 7.5 cents per \$1,000)	\$ 0.0750	\$ 0.0750	\$ 0.0750
STATEMENT OF INDEBTEDNESS			
LONG TERM DEBT	Estimated Debt Outstanding on July 1	Estimated Debt Authorized, But Not Incurred on July 1	
Total	None	None	

General Fund Resources

FORM LB-20				RESOURCES General Fund	West Multnomah SWCD			
				(Fund)				
	Historical Data			RESOURCE 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						
				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	1,528,000	1,556,000	2
3	21,557	25,868	43,934	3. Previously levied taxes estimated to be received	35,093	35,093	35,093	3
4	26,024	9,208	7,500	4. Interest	5,500	5,500	5,500	4
5	-	48,586	-	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	50,000	200,000	8
9	143,600	132,362	151,009	9. State Funding	184,557	184,557	184,557	9
10	30,000	5,500	30,000	10. Local/Regional Funding	20,000	20,000	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	23,215	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	1,365,779	1,595,083	29. Total resources, except taxes to be levied	1,846,365	1,846,365	2,024,365	29
30			1,712,000	30. Taxes estimated to be received	1,912,000	1,912,000	1,912,000	30
31	1,642,029	1,691,225		31. Taxes collected in year levied				31
32	3,080,241	3,057,004	3,307,083	32. TOTAL RESOURCES	3,758,365	3,758,365	3,936,365	32

General Fund Requirements

REQUIREMENTS SUMMARY									
FORM LB-30		BY FUND, ORGANIZATIONAL UNIT OR PROGRAM							
		General Fund						West Multnomah SWCD	
	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	1,634,504	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	1,634,504	1,634,504	7	
	11.3	10.8	10.8	Total Full-Time Equivalent (FTE)	11.3	11.3	11.3		
				MATERIALS AND SERVICES					
8	214,986	184,494	306,204	8 Operations	375,728	375,728	395,728	8	
9	364,490	310,557	491,100	9 Conservation Programs & Services	549,223	549,223	707,223	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	924,951	1,102,951	14	
				CAPITAL OUTLAY					
15	-	-	18,650	15 Capital Outlay	40,000	40,000	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	40,000	40,000	21	
				Interfund Transfer and Other					
22	170,500	-	-	22 Transfer Out to Sturgeon Lake Special Fund	-	-	-	22	
23				23				23	
24			25,000	24 Reserved for Future Expenditures	25,000	25,000	25,000	24	
25			50,000	25 General Operating Contingency	50,000	50,000	50,000	25	
26	170,500	-	75,000	26 TOTAL TRANSFERS, RESERVES & CONTING.	75,000	75,000	75,000	26	
27	2,019,892	1,773,351	2,334,222	27 TOTAL EXPENDITURES	2,674,455	2,674,455	2,852,455	27	
28	1,060,349	1,283,653	972,861	28 UNAPPROPRIATED ENDING FUND BAL.	1,083,910	1,083,910	1,083,910	28	
29	3,080,241	3,057,004	3,307,083	29 TOTAL	3,758,365	3,758,365	3,936,365	29	

Sturgeon Lake Fund

SPECIAL FUND									
FORM			RESOURCES AND REQUIREMENTS						
LB-10			Sturgeon Lake			West Multnomah Soil & Water Conservation District			
	Historical Data			(Fund)	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. TOTAL RESOURCES				12	
				MATERIALS AND SERVICES					
13	207,968	42,976		13 Contracted Services				13	
14				14				14	
15	207,968	42,976	-	15 TOTAL MATERIALS AND SERVICES				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 TOTAL CAPITAL OUTLAY				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 TOTAL TRANSFERS, RESERVES AND CONTINGENCIES				27	
28	216,016	92,797	-	28 TOTAL EXPENDITURES				28	
29	89,696	-		29 UNAPPROPRIATED ENDING FUND BALANCE				29	
30	305,712	92,797	-	30 TOTAL REQUIREMENTS				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	Adopted Budget General Fund (LB-20 & 30)
Beginning Balance	1,556,000							1,556,000
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.	1,596,593	-	-	-	-	-	-	1,596,593
Federal Funding (USDA FSA, NRCS, NACD)			40,000		10,000		150,000	200,000
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	43,500	6,719	106,533	65,433	160,000	427,772
Taxes Estimated to be Received	1,912,000							1,912,000
All Resources less Beginning Balance	1,992,180	6,000	43,500	6,719	106,533	65,433	160,000	2,380,365
Total Resources	3,548,180	6,000	43,500	6,719	106,533	65,433	160,000	3,936,365
Expenditures								
Salaries & Wages	471,805	-	120,012	119,499	108,440	170,531	120,012	1,110,298
Insurance: Medical, Life, Vision, Dental	44,813	1,680	4,710	23,064	17,711	55,022	19,226	166,226
Worker's Comp	1,809	-	469	484	608	716	469	4,555
PERS	92,276	11,516	23,581	28,524	23,581	37,187	23,581	240,246
Payroll Taxes	48,094	-	12,234	12,181	11,054	17,383	12,234	113,180
Total Personnel	658,797	13,196	161,006	183,752	161,393	280,839	175,521	1,634,504
Forestry			48,520					48,520
Habitats				74,070				74,070
Soil & Farms					80,250			80,250
Urban							186,950	186,950
Invasive Species						99,733		99,733
Education Programs		18,400						18,400
Partner Funding		44,800		10,000		22,000	122,500	199,300
Total Conservation Programs	-	63,200	48,520	84,070	80,250	121,733	309,450	707,223
Events & Supplies	14,400							14,400
Printing/Production/Signage, Banners, Displays	10,600							10,600
Sponsorship of Community Events	2,200							2,200
LRBP Implementation and messaging	3,750							3,750
Special Project (Website redesign)	25,000							25,000
Outreach and Translation Services	9,000							9,000
Website hosting, Media, Advertising, Marketing, Creative Services	2,880							2,880
Communication & Outreach Expenses	67,830		-	-	-	-	-	67,830
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)	41,200							41,200
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
Administrative Operating Expenses	327,898	-	-	-	-	-	-	327,898
Total Administrative and Communications Operations	395,728							395,728
Total Materials and Services Expenses	395,728	63,200	48,520	84,070	80,250	121,733	309,450	1,102,951
								-
Sturgeon Lake Stewardship Capital expenditures	10,000							10,000
IT and Vehicle / boat using grant funding	30,000							30,000
Total Capital Outlay	40,000							40,000
Total Personnel, M&S, Capital; Before SL Xfer, Conting, Reserves	1,094,525	76,396	209,526	267,822	241,643	402,572	484,971	2,777,455
General Operating Contingency	50,000							50,000
Reserve for Future Expenses or Economic Stabilization Reserve	25,000							25,000
Total Transfers, Reserves and Contingencies	75,000	-	-	-	-	-	-	75,000
Total Expenditures	1,169,525	76,396	209,526	267,822	241,643	402,572	484,971	2,852,455
Ending Fund Balance Required								
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
Total Ending Fund Balance Required								1,083,910
Total Requirements								3,936,365

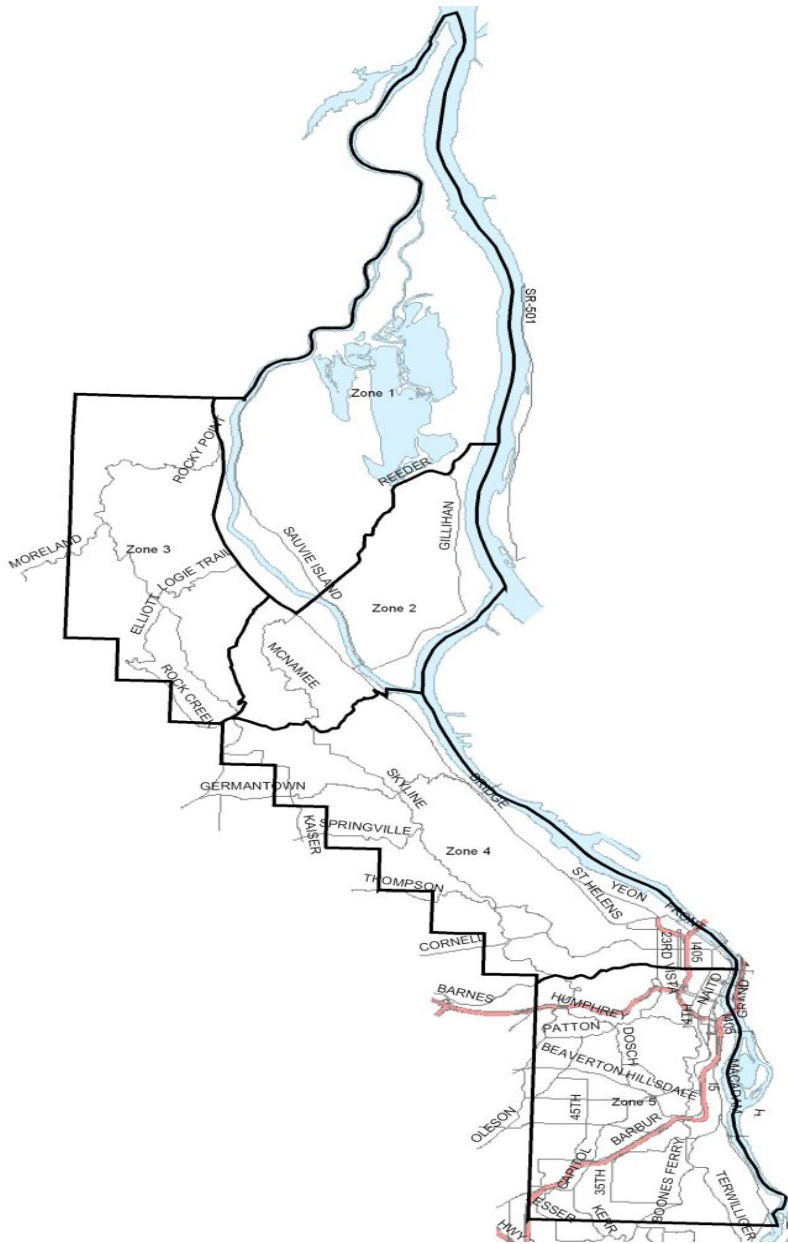
Summary of Changes Between Approved and Adopted Budget

WEST MULTNOMAH SOIL & WATER CONSERVATION DISTRICT DETAILED RESOURCES AND EXPENDITURES		Approved Budget	Changes Recommended	Recommended General Fund Budget for ADOPTION	Explanations for changes
1	Beginning Balance	1,528,000	28,000	1,556,000	Underspending increased over previous estimates \$20K in Conservation area and \$8K in Personnel area; represents additional amounts to be carried over to 7/1/22 beginning balance.
2	Previously Levied Taxes estimated to be rec'd	35,093	-	35,093	
3	Earnings from temporary investments	5,500	-	5,500	
4	Total before Grants, Prop, Taxes and Misc.	1,568,593	28,000	1,596,593	
5		-		-	
6	Federal Funding (NRCS, NACD)	50,000	150,000	200,000	USDA FSA funding for Urban Ag (\$375K over multiple years) & USDA-NRCS Partnership for Climate-Smart Commodities (\$400K over multiple years).
7	State Funding (ODA, OWEB, OSWB, OISC, ODF)	184,557	-	184,557	
8	Local/Regional Funding (Metro & CREST)	20,000	-	20,000	
9	Other Funding	-	-	-	
10	Reimb & Misc & Contributions (workshops, cost-share, BES, Parks)	23,215	-	23,215	
11	Total Other Resources	277,772	150,000	427,772	
12	Taxes Estimated to be Received	1,912,000	-	1,912,000	
13		-	-	-	
14	All Resources less Beginning Balance	2,230,365	150,000	2,380,365	
15	Total Resources	3,758,365	178,000	3,936,365	
16					
17	Expenditures				
18	Salaries & Wages	1,110,298	-	1,110,298	
19	Insurance: Medical, Life, Vision, Dental	166,226	-	166,226	
20	Worker's Comp	4,555	-	4,555	
21	PERS	240,245	-	240,246	
22	Payroll Taxes	113,180	-	113,180	
23	Total Personnel	1,634,504	-	1,634,504	
24					
25	Forestry	48,520	-	48,520	
26	Habitats	74,070	-	74,070	
27	Soil & Farms	80,250	-	80,250	
28	Urban	28,950	158,000	186,950	\$100K for USDA FSA grant funded work (incorporating conservation practices and nurturing habitat for pollinators and wildlife); \$50K for USDA Climate Smart grant funded projects that have farming, ranching or forestry practices that reduce greenhouse gas emissions or sequester carbon (cover crops, low- or no-till, soil quality); \$8K for Urban work postponed to after 6/30/22 and part of carryover balances.
29	Invasive Species	99,733	-	99,733	
30	Education Programs	18,400	-	18,400	
31	Partner Funding	199,300	-	199,300	
32	Total Conservation Programs	549,223	158,000	707,223	
41	Communication & Outreach Expenses	67,830	-	67,830	
42	Facilities (includes office space, storage facilities, employee parking)	66,000	-	66,000	
43	Relocation expenses (one-time)	75,420	-	75,420	
44	Computers/Maintenance (monthly support, software and add-ons)	20,657	-	20,657	
45	Program related transportation (vehicles, gas, parking) & field supplies	22,648	-	22,648	
46	Communications (Phone and Internet)	18,074	-	18,074	
47	Insurance (general liab., auto, property, crime)	10,395	-	10,395	
48	Membership & Profess. Organizational Dues	10,000	-	10,000	
49	Office & meeting supplies (includes field supplies used across programs)	7,163	-	7,163	
50	Professional Contracted Non-Employee Services	21,200	20,000	41,200	Potential cost of external HR services for recruitment / consulting.
50	Service and other fees (bank, payroll, notices)	8,891	-	8,891	
51	Furniture / Office Equipment	10,600	-	10,600	
52	Real Estate Legal Services for Sturgeon Lake	16,000	-	16,000	
53	TriMet option incentive for staff	2,400	-	2,400	
54	Staff and Board Training	18,450	-	18,450	
55	Administrative Operating Expenses	307,898	20,000	327,898	
56	Total Administrative and Communications Operations	375,728	20,000	395,728	
57	Total Materials and Services Expenses	924,951	178,000	1,102,951	
58					
59	Sturgeon Lake Stewardship Capital expenditures	10,000	-	10,000	
60	IT Equipment	30,000	-	30,000	
61	Total Capital Outlay	40,000	-	40,000	
62					
63	Total Personnel, M&S, Capital; Before SL Xfer, Conting, Reserves	2,599,455	178,000	2,777,456	
65					
66	General Operating Contingency	50,000	-	50,000	
67	Reserve for Future Expenses or Economic Stabilization Reserve	25,000	-	25,000	
68	Total Transfers, Reserves and Contingencies	75,000	-	75,000	
69					
70	Total Expenditures	2,674,455	178,000	2,852,455	
71					
72	Ending Fund Balance Required:				
73	For minimum required months of operations funding	877,500	-	877,500	
74	Reserve for Future Expenses or Economic Stabilization Reserve	125,000	-	125,000	
75	Assigned to Sturgeon Lake Stewardship Account	81,410	-	81,410	
76	Total Ending Fund Balance Required	1,083,910	-	1,083,910	
77	Total Requirements	3,758,365	178,000	3,936,365	

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 farmland, 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 km²), of which 435 square miles (1,127 km²) are land and 79 km² (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. 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.”**

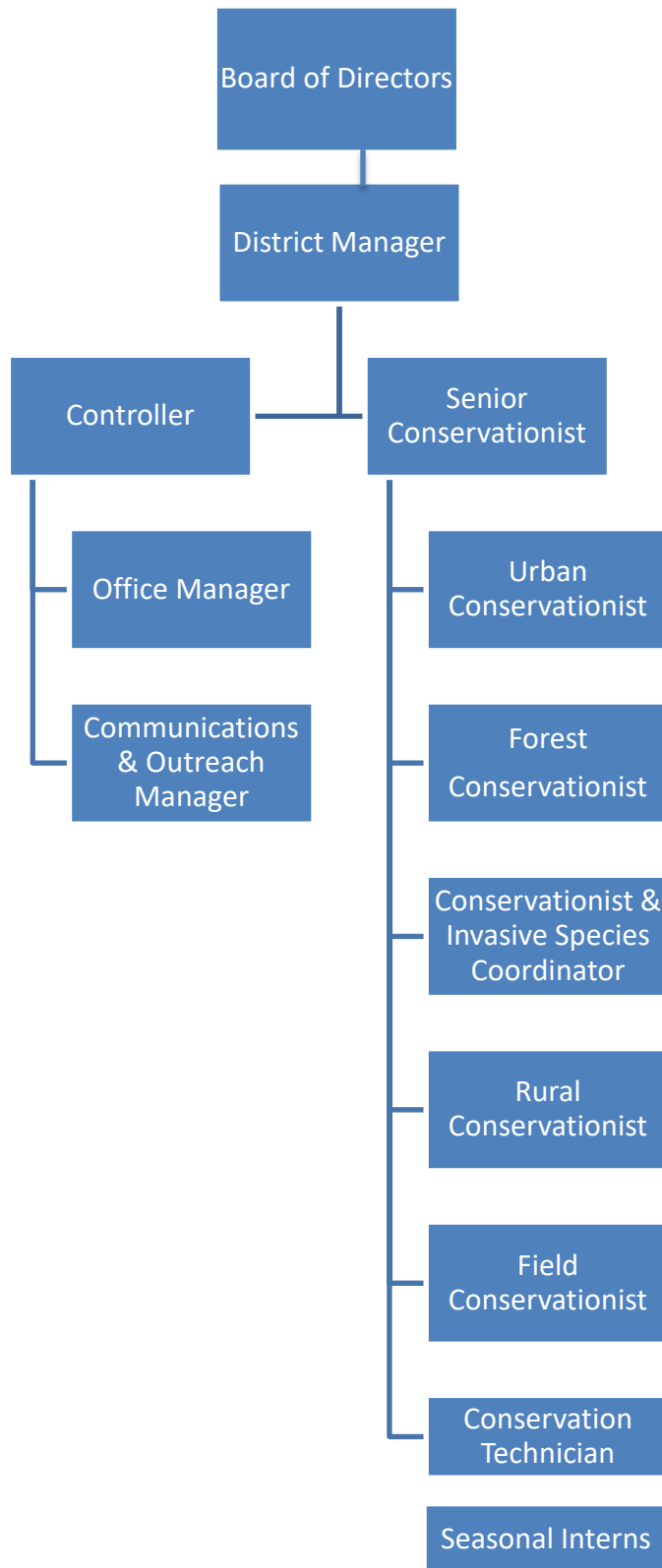
History

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. 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 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 helps conservationist/technical staff with field work, outreach efforts and data collection and management.

Conservation Technician – .85 FTE

This position helps 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: GLOSSARY

Accrual: An entry which records an expense for which no cash disbursement has occurred at the end of the fiscal year, although the expense was incurred in that fiscal year. Accruals are used to ensure expenses are recorded in the fiscal year in which they are incurred, regardless of when payment takes place.

Accrual Basis of Accounting: Accounting method in which revenue is recognized when it is earned, regardless of when cash is received; expenses are recognized when the associated liability is incurred, regardless of when cash is paid.

Ad Valorem Tax (“to the value”): A tax based on the assessed value of taxable (real estate and personal) property.

Adopted budget: Financial plan that is the basis for appropriations. Adopted by the governing body (Board of Directors). [ORS 294.456]

Appropriation: Authorization for spending a specific amount of money for a specific purpose during a fiscal year. It is based on the adopted budget, including supplemental budgets, if any. It is presented in a resolution adopted by the governing body. [ORS 294.311(3)]

Approved budget: The budget that has been approved by the budget committee. The data from the approved budget is published in the Financial Summary before the budget hearing. [ORS 294.428]

Assessed Value: The value set by a county assessor on real and personal taxable property as a basis for levying taxes. It is the lesser of the property’s maximum assessed value or real market value. The growth is limited to 3 percent unless an exception applies (e.g., new or enlarged structure).

Assessment date: The date on which the real market value of property is set – January 1.

Audit: The annual review and appraisal of a municipal corporation’s accounts and fiscal affairs conducted by an external accountant under contract or the Secretary of State. [ORS 297.425]

Audit report. A report in a form prescribed by the Secretary of State made by an auditor expressing an opinion about the propriety of a local government’s financial statements, and compliance with requirements, orders, and regulations.

Balanced Budget: Oregon Budget Law requires jurisdictions within Oregon to propose and adopt balanced budgets. According to Oregon Administrative Rule relating to Local Budget Law, a balanced budget is when the total of all resources equals the total of expenditures and requirements. A budget that meets these specifications is considered balanced.

Ballot Measure 5: A constitutional tax rate limitation (Article XI, Section 11b) passed by the voters in 1990 which restricts the amount an individual property can be taxed. Measure 5 limits school taxes to \$5 per \$1,000 of “real market value”. All other general government taxes are limited to \$10 per \$1,000 of “real market value”.

Ballot Measure 50: A Constitutional amendment referred to the voters by the Legislature in May 1997. Ballot Measure 50 rolled assessed values back to FY 1994–95 levels less 10 percent and allows them to increase no more than 3 percent per year. Existing operating tax levies (including tax bases and levies

approved in November 1996) were reduced by a statewide average of 17 percent and were converted to rate-based levies. Ballot Measure 50 took effect in FY 1997–98.

Beginning Fund Balance: Net resources (cash and non-cash) available in a fund at the beginning of a fiscal year, carried over from the prior fiscal year.

Board of Directors: The District is governed by a seven-member Board of Directors. Individual directors are publicly elected in the November General Election held on even-numbered years. Directors serve four-year terms. Five directors are elected to represent specific zones in the District. Two directors are elected “at large,” meaning they do not represent a designated zone.

Bonds: A written promise to pay a sum of money at a future date, with interest paid at an agreed rate on a set schedule. Bonds are typically used by governments to finance long-term capital improvements.

Budget: A plan for receiving and spending money and a means to establish legal appropriations for the fiscal year. The budget serves as a financial plan, policy document, operations guide, and communications device.

Budget Calendar: The schedule of key dates and major events in the budget process.

Budget Committee: Fiscal planning committee of a local government, consisting of the governing body plus an equal number of electors registered to vote in the District’s service area. [ORS 294.414]

Budget message: Written explanation of a local government’s budget and financial policies, including any changes from the prior fiscal year. It is prepared and presented under the direction of the governing body or designee. [ORS 294.403]

Budget officer: Person appointed by the governing body to assemble budget material and information and to prepare the proposed budget. [ORS 294.331]

Budget Phases: The District’s annual budget is developed in four phases, as follows:

Requested: Requests from each program manager for the following year’s budget.

Proposed: The Budget Officer’s recommended budget, which is reviewed by the Budget Committee.

Approved: The budget and tax levy as approved by the Budget Committee that is forwarded to the Multnomah County Tax Supervising and Conservation Commission for its certification.

Adopted: The budget as adopted by the Board of Directors through a budget hearing and budget resolution, following certification by the Tax Supervising and Conservation Commission.

Capital Outlay: A expenditure category that includes appropriations for the purchase or improvement of land and buildings, and for furniture, equipment, and vehicles with a cost of more than \$2,000 and a useful life in excess of one year.

Cash Basis of Accounting: Accounting method under which revenues are accounted for only when cash is received, and expenditures are accounted for only when paid. [ORS 294.311(9)]

Compression: The effect produced if the combined (and otherwise authorized) property tax rates in a taxing area exceed the limits imposed by Ballot Measure 5. The result of having taxes greater than the limit is that each general government jurisdiction’s rate is reduced proportionally. Compression is computed on

a property-by-property basis, and is first applied towards local option tax levies, then permanent rate levies.

Conservation Education: Educating the public, focusing on residents and partners in the District's service area, about local natural resource concerns, teaching best management practices to manage these resources, and providing conservation tools to create a healthy and livable community.

Conservation Financial Assistance: Funding to implement projects to address natural resource concerns in the District's service area is distributed through direct resident assistance, landowner direct cost share arrangements, partner agreements, and small grants (Financial Incentives for Sustainable Habitats or FISH).

Conservation Plan: A customized, detailed guide to help a landowner manage their land while protecting natural resources. Plans address site-specific issues through practices to conserve soil, water, and related plant and animal resources. The District helps develop plans at no cost to residents. Each resident makes all decisions on their plan, implements the plan, and has complete control over the activities on their land (within local permitting guidelines).

Conservation Technical Assistance: A service provided to residents through one-on-one site visits and consultation to implement sustainable solutions to conserve and enhance natural resources.

Constitutional limits. The maximum amount of tax on property that can be collected from an individual property for education and for other government activities (Article XI, section 11b, Oregon Constitution).

Contingency: A major expenditure category that includes appropriations set aside for unforeseen expenses. The Board of Directors must approve, by resolution, any transfers from a contingency account to an expenditure account.

Contract: An agreement in writing between two parties where there is an exchange of goods or services. A contract is enforceable by law.

Department of Environmental Quality–Oregon (DEQ): The Oregon Department of Environmental Quality, a state agency, which regulates the District's solid waste disposal system and aspects of the District planning operations such as air quality and water quality.

District: West Multnomah Soil and Water Conservation District, a local government entity.

District Service Area: The area inside the District's boundary, which includes the portion of Multnomah County west of the Willamette River, all 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.

Diversity, Equity, and Inclusion (DEI): A program dedicated to promoting diversity, equity, and inclusion of underrepresented and marginalized people in the District's staff, board, and served populations.

Ending Fund Balance: Unspent and unobligated net resources at the end of a fiscal year. Usually generated by cash reserves and under-spending of appropriations.

Expenditure: The total amount incurred if accounts are kept on an accrual basis or modified accrual basis. Does not include amounts budgeted for interfund transfers, contingency, reserved for future expenditure or unappropriated ending fund balance. [ORS 294.311(16)]

Fiscal Year: The District's annual budget and accounting period, from July 1 through June 30.

Full-time Equivalent (FTE): The ratio of time expended in any position to that of a fulltime position. One person working full-time for one year is one FTE.

Fund: An independent fiscal and accounting entity with a self-balancing set of accounts that is segregated for the purpose of carrying on specific activities or attaining certain objectives. There are nine fund types. The District maintains only one fund, the General Fund.

Special Revenue: Resources are restricted to expenditures for specific purposes.

Fund Balance: The difference between a fund's assets and its liabilities; a fund's net resources.

General Fund: See description under Fund.

Generally Accepted Accounting Principles (GAAP): A standard established by the Accounting Practices Board of the American Institute of Certified Public Accountants. These rules, conventions and procedures define accepted accounting practices.

Governmental Accounting Standards Board (GASB): A private, non-profit organization established in 1984; responsible for setting generally accepted accounting principles for state and local governments.

Grant: A contribution of assets by one entity to another. Grants are generally designated for a specific expenditure or project.

Indirect Costs: The central overhead costs (i.e., payroll, accounts payable, legal counsel) necessary for the operation of a department or execution of a grant and not directly attributable to a specific function or grant. These costs are computed and charged to the appropriate department or grant based on a cost allocation plan.

Interfund Transfer: 1. An amount of money distributed from one fund to finance activities in another fund.
2. A major expenditure category that accounts for all movement of money from one fund to another.

Intergovernmental Agreement (IGA): A signed agreement between two or more units of government, often approved by governing bodies, which provides for the exchange of goods or services between the governments.

(The) Intertwine: A network of integrated parks, trails, and natural areas. The Intertwine provides opportunities to preserve natural areas, open spaces, water, and wildlife habitat.

Intrafund transfer. Transfer from one existing appropriation category to another within the same fund. [ORS 294.463]

Levy: Amount of ad valorem tax certified by a local government for the support of governmental activities.

Liability: Debt or other legal obligation arising from transactions in the past which must be liquidated, renewed, or refunded at a future date. [ORS 294.311(24)]

Local government: Any city, county, port, school district, community college, public or quasi-public corporation (including a municipal utility or dock commission) operated by a separate board or commission, a municipal corporation, or municipality. [ORS 294.311(26)]

Local option tax: Taxing authority approved by voters that is in addition to the taxes generated by the permanent tax rate. Local option taxes can be for general operations, a specific purpose or capital

projects. They are limited to five years unless they are for a capital project, then they are limited to the useful life of the project or 10 years, whichever is less. [Article XI, section 11(4)]

Major Expenditure Category: One of six classifications of spending, including personal services, materials and services, debt service, capital outlay, interfund transfers and contingency.

Materials and Services: A major expenditure category that includes contractual and other services, materials, supplies and other charges.

Maximum assessed value (MAV). The maximum taxable value limitation placed on real or personal property by the Article XI, section 11 of the Constitution. It can increase a maximum of 3 percent each year. The 3 percent limit may be exceeded if there are qualifying improvements made to the property, such as a major addition or new construction. [ORS 308.146]

Measure 5, Measure 50: See Ballot Measures.

Modified Accrual Basis of Accounting: The accrual basis of accounting adapted to the governmental fund type under which revenues are recognized when they become both measurable and available to finance expenditures of the current period. Expenditures are generally recognized when the related fund liability is incurred.

Nature in Neighborhoods: A regional habitat protection, restoration and greenspaces program that inspires, strengthens, coordinates, and focuses the activities of individuals and organizations with a stake in the region's fish and wildlife habitat, natural beauty, clean air and water and outdoor recreation.

One-time Revenue: A source of funding that cannot reasonably be expected to recur. Examples include single-purpose grants, use of reserves and proceeds from the sale of property or other assets.

Pass-through: Resources given by one government or organization to another with a requirement that it be given to a third government or organization.

Performance Measures: Quantifiable effectiveness measures of the impact of specific District efforts towards achieving program goals.

Permanent rate limit: The maximum rate of ad valorem property taxes that a local government can impose. Taxes generated from the permanent rate limit can be used for any purpose. No action of the local government or its voters can increase or decrease a permanent rate limit. A district can levy any rate or amount up to their permanent rate authority each year.

Prior year's tax levies: Taxes levied for fiscal years preceding the current one.

Position: A budgeted authorization for employment, which can be full-time or part-time. One position may be budgeted as any fraction of an FTE but cannot be budgeted at more than one FTE.

Program: Defined as either a group of related projects managed in a coordinated way, or a distinct set of offerings targeted at a specific audience to yield a specific outcome (such as the Stormwater Stars program). Programs are based upon outcomes of offerings, target audience and delivery method, and do not have a defined life.

Project: A temporary endeavor to create a unique work product, service, or result.

Public Employees Retirement System (PERS): The retirement benefit package offered by most public jurisdictions in the state.

Real market value: The amount in cash which could reasonably be expected by an informed seller from an informal buyer in an arm's-length transaction as of the assessment date (Jan 1). [ORS 308.205]

Records and Information Management System: system to manage information from the time records are received or created through their processing, distribution, use and placement in a storage or retrieval system until their eventual destruction or permanent archival retention.

Requirements: Total budgeted expenditures (including contingency) plus the amount of unappropriated balance.

Reserve for future expenditure. An amount budgeted, but not appropriated, that is not anticipated to be spent in the fiscal year, but rather carried forward into future fiscal years. The correct way to “save” money under Local Budget Law.

Resources: All financial assets of a fund, including anticipated revenues plus fund balance available at the start of the fiscal year.

Restoration Work: projects that preserve natural lands or are in support of restoring land to its natural state.

Revenue: Assets earned or received by the General Fund during a fiscal year.

Supplemental Budget: A change to an adopted budget that is undertaken during the fiscal year a budget is in effect, as defined by Oregon local budget law. A supplemental budget is required to create a new fund or appropriation category, to increase appropriation authority, or to transfer more than 15 percent of total appropriations from contingency to another appropriation category

Sustainability: Using, developing, and protecting resources in a manner that enables people to meet current needs while ensuring that future generations can also meet their needs, from the joint perspective of environmental, economic and community objectives.

Tax Base: Property taxes dedicated to the annual financial support of a government or a government operation, authorized by voter approval.

Tax Supervising and Conservation Commission (TSCC): Review body, composed of citizens appointed by the governor, whose charge under state law is to review the budgets of jurisdictions headquartered in Multnomah County and determine whether they comply with Oregon's local government budget law. The TSCC reviews the approved budget and supplemental budgets of the District prior to adoption, to certify compliance.

Unappropriated Ending Fund Balance: A line item in the budget that represents amounts set aside to be carried over to the following fiscal year. It provides the local government with operating cash until tax money is received from the county treasurer in November. This amount cannot be transferred by resolution or used through a supplemental budget, unless necessitated by a qualifying emergency. [ORS 294.398]

APPENDIX D: ACRONYMS

AWQMP	Agriculture Water Quality Management Program
BES	Bureau of Environmental Services
BMP	Best Management Practices
COBID	Certification Office for Business Inclusion and Diversity
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)
EWPP	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 SB1010)
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

APPENDIX E: FINANCIAL POLICIES

The District's financial policies, summarized below, set forth the basic framework for the overall fiscal management of the District. Operating independently of changing circumstances and conditions, these policies assist the decision-making process of the Board of Directors and the District leadership team. These policies provide guidelines for evaluation of both current activities and proposals for future expenditures. Policies are reviewed annually and revised, as necessary, to ensure they continue to be relevant and are responsive to any new requirements or mandates. These policies are the basis of the District's Standard Operating and Accounting Procedures and are intended to be consistent with the best practices recommended by the Government Finance Officers Association and in full compliance with policies and procedures dictated by the State of Oregon statutes (for example Oregon Budget Law, found in sections of Oregon Revised Statutes chapter 294). Most of the policies represent long-standing principles and practices which have guided the District in the past and have helped maintain financial stability since 2006, when the District voters approved a tax base.

Budget and Financial Planning

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

Finance and Accounting

- Financial and accounting duties and responsibilities will be separated for internal control purposes to the greatest extent possible so that no one staff member can control all phases of collecting cash,

recording cash, processing transactions and reconciling accounts in a way that permits errors or omissions to go undetected.

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

Use of District Resources

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

Revenue and Cash Management

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

Investment

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

Asset Management

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

Debt

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

APPENDIX F: LONG-RANGE BUSINESS PLAN 2021-2025



WEST MULTNOMAH
Soil & Water Conservation District



Long Range Business Plan

2021-2025



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

District Service Area

The District's service area includes the portion of Multnomah County west of the Willamette River, all of Sauvie Island, and a portion of the Bonny Slope region of the Tualatin Mountains in Washington County. The zones ensure geographic representation on the District's elected board of directors.

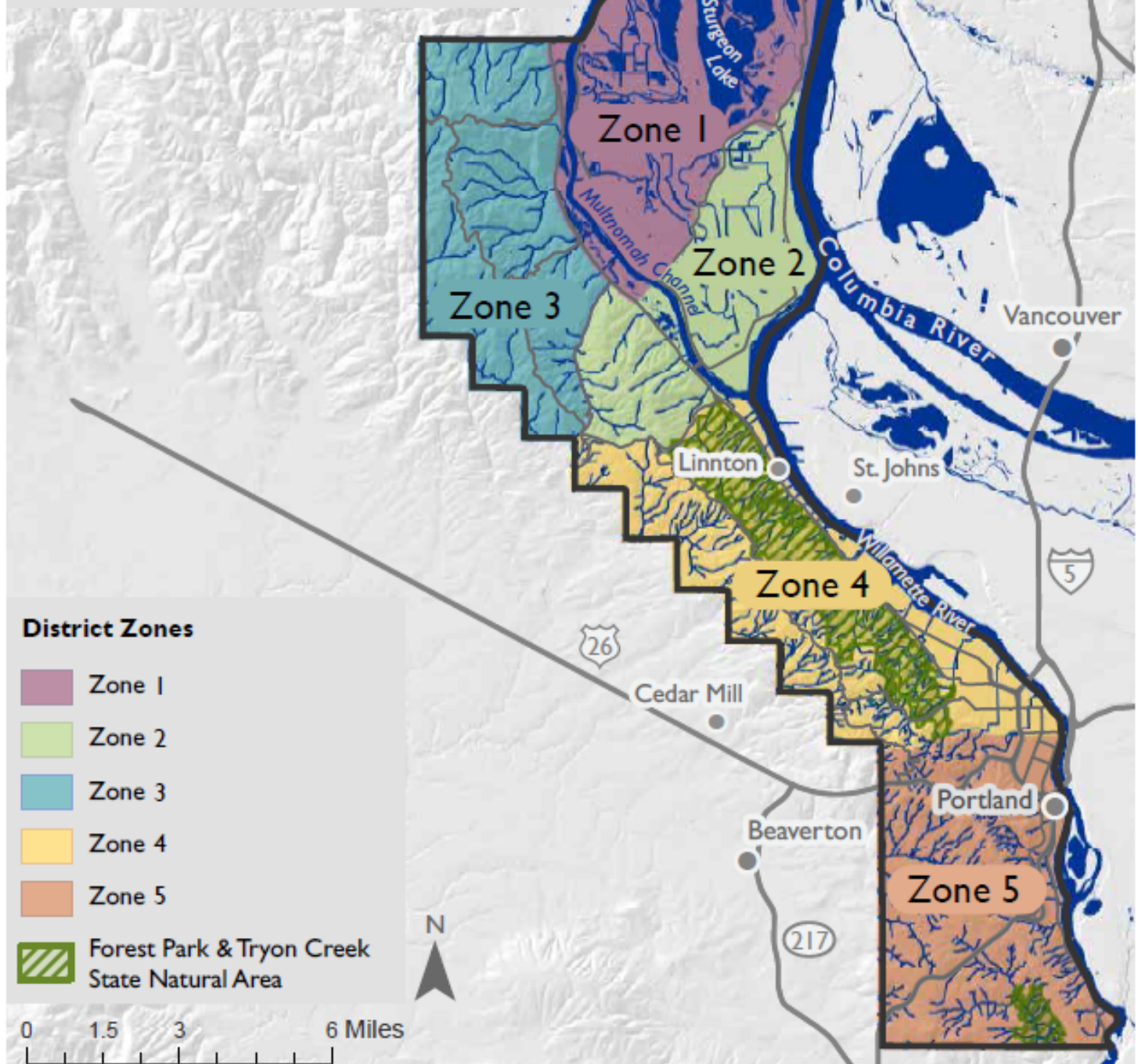


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Cover photos, top to bottom
Osprey (*Pandion haliaetus*), a Willamette Valley native bird found in habitat along lakes and rivers; Grand Collomia (*Collomia grandiflora*), a Willamette Valley native plant used in meadowscapes; Replacing sod grass with meadowscaping plants; Cover crops in a field, oats on left and a combination of rye and vetch on right.
Osprey photo by Pat Welle (patwelle.com),
Grand Collomia by Mary Bushman, City of Portland, Bureau of Environmental Services, all others by West Multnomah Soil & Water Conservation District (wmswcd.org).



Executive Summary

The West Multnomah Soil & Water Conservation District (“District”) is excited to have developed this Long Range Business Plan (LRBP) – the product of a novel development process which involved community outreach and surveys, partner interviews, equity lens reviews, external draft reviews, and robust staff and board engagement. The result of this process led to the new mission, vision, strategic directions, goals, tactics, and organizational values and principles that are outlined in this plan. The LRBP is a strategic planning document that guides the scope of the District’s conservation work and the supporting financial sustainability and organizational health initiatives needed to implement this work over the next 5 years (2021-2025). The plan is centered on diversity, equity, and inclusion. This LRBP will guide the development of the District’s annual work plans and budget for fiscal years (July 1 through June 30) 2021-22, 2022-23, 2023-24, 2024-25, and 2025-26.

Our Mission

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

Our 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.

Information Gathering, Purpose, and Audience

To better inform this plan we reached out to community members, community leaders, owners of farms and forests, other conservation program participants, organizational partners, staff and board. After gathering initial input through interviews, surveys, and working sessions, we developed a diverse conservation scope advisory committee comprised of partners, community members, landowners, and community leaders to help shape the strategic directions, goals, and tactics included in this plan. This plan is intended to be a living document that guides District staff and board in conducting our work and helps ensure that policies, programs, services, and decisions are beneficial to people, wildlife, and the environment. We hope that external audiences such as our

partners and others with whom we work find this to be a useful document for tracking and holding us accountable in our behaviors, operations, and actions.

History

The West Multnomah Soil & Water Conservation District was first established in 1944 as the Sauvie Island Soil Conservation District to direct agricultural producers on Sauvie Island to soil conservation technical assistance resources. Over time, the District followed the national trend to include addressing water quality, forest health, and habitat diversity as part of our mission; expanding in size to include the urban areas of downtown, northwest, and southwest Portland, and the forests of the Tualatin Mountains. In 2006, voters passed a permanent property tax levy that allowed for the expansion of staff to include professional expertise in urban conservation, habitat conservation, community garden conservation, conservation education, forest conservation, invasive species prevention and control, in addition to existing rural conservation expertise for agriculture. Key to our understanding of how to improve upon our scope of work is understanding our shared history with Black, Indigenous, and other people of color who have collectively been displaced from or denied ownership access to the land. In 2019, the District released the paper [*Whose Land is Our Land? Spatial Exclusion, Racial Segregation, and the History of the Lands of Western Multnomah County*](#). This research spotlights the challenge of pursuing equitable and inclusive outcomes in an area that has inherited roughly two centuries of legal, institutional, and economic factors that have inequitably distributed land and access to natural resources to predominately white communities.

Strategic Directions

The following Strategic Directions (SD) define the scope of our work.

1. **EQUITY AND INCLUSION** | Embed equity and inclusion in all that we are and all that we do.
2. **ORGANIZATIONAL HEALTH** | Ensure we are welcoming, adaptable, supportive, effective, and sustainable in our practices.
3. **FINANCIAL SUSTAINABILITY** | Ensure we are financially sustainable.
4. **SHARING CONSERVATION INFORMATION** | Share conservation information so people have the knowledge and confidence to take action.

5. **WATER AND SOIL** | Protect and improve water quality and soil health.
6. **HABITATS AND BIODIVERSITY** | Protect, enhance, and restore biodiversity, native landscapes, habitats, and ecological function.
7. **WORKING FARMS, FORESTS AND GARDENS** | Enhance the long-term health and productivity of farms, forests, woodlands, and gardens.
8. **CLIMATE CHANGE** | Promote resilient environments and communities in the face of climate change.
9. **RELATIONSHIPS WITH THE LAND** | Enhance, support, and create opportunities for all people, especially those historically and presently displaced from and deprived of land, to foster mutually beneficial relationships with the land.
10. **LONG-TERM SUCCESS** | Provide for the long-term continuous success of our conservation actions.

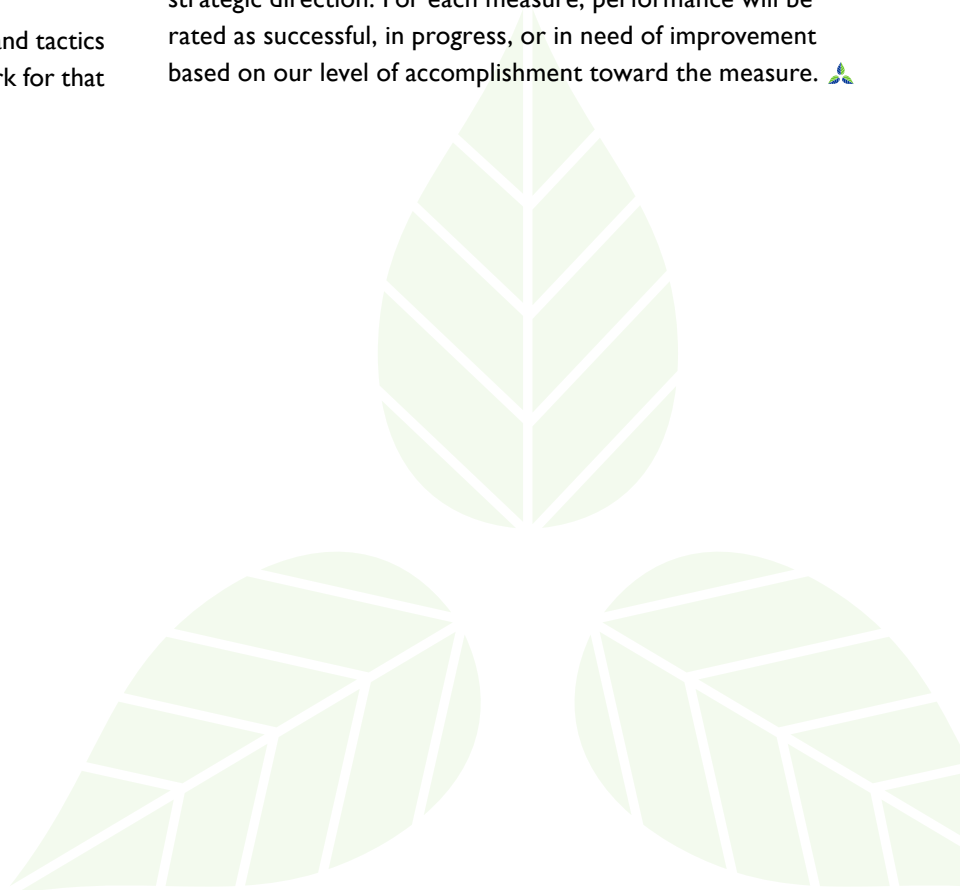
Strategic Directions #1 through #3 are foundational and necessary for the long-term success of the District. Strategic Direction #4 intersects and supports all of the strategic directions, especially the strategic directions (#5 through #10) that define the scope of our conservation work.

Each strategic direction has a set of prioritized goals and tactics that define more specifically the District's area of work for that

strategic direction. The tactics also describe actions that further illuminate the purpose of the goal to which they belong. Some of the District's work is prioritized by geographic focus areas; mapped areas help us allocate staff time and financial resources to where we believe District investment in conservation will have the greatest impact. The LRBP includes geographic focus areas for working lands, priority landscapes, priority habitats, priority watersheds, and priority environmental education areas. The District strives to maintain a balance between conducting targeted outreach so as to create conservation opportunity within a geographic focus area, but at the same time remain flexible to respond to a request for conservation assistance from outside a geographic focus area when the conservation need is ripe and ready for action.

Implementation and Performance

This LRBP will be implemented through the District's annual work planning and budget adoption process. Annual work plans determine which strategic directions and goals each staff member will be implementing through their programs of work. Not all goals will be implemented in any given year; especially those goals and tactics that the District needs to build capacity and better understanding in order to implement. Performance for implementing this LRBP will be based on an annual review of defined measures of success for each strategic direction. For each measure, performance will be rated as successful, in progress, or in need of improvement based on our level of accomplishment toward the measure. 🌱



Introduction

This Long Range Business Plan (LRBP)¹ is a strategic planning document that guides the scope of the West Multnomah Soil & Water Conservation District's (the "District") conservation work and the supporting financial sustainability and organizational health initiatives needed to implement this work over the next 5 years (2021-2025). The plan is centered on diversity, equity, and inclusion. This LRBP will guide the development of the District's annual work plans and budget for fiscal years (July 1 through June 30) 2021-22, 2022-23, 2023-24, 2024-25, and 2025-26.

Divided into five geographic zones, the District provides voluntary conservation services to people who live, work, or otherwise have an interest in our geographic service area: the portion of Multnomah County west of the Willamette River, all of Sauvie Island including the Columbia County portion of Sauvie Island, and a portion of the Bonny Slope area of the Tualatin Mountains in Washington County (see page 2). The District provides resources, information, and expertise to inspire people to actively improve air and water quality, fish and wildlife habitat, and soil health. To accomplish our work, we work collaboratively with those who are caring for and giving to the land, including private owners of farms and forests, tenants, schools, non-profit organizations, culturally specific organizations, neighborhood and other local community centers, and government agencies.

We do this work so that all people in our district are informed about and able to engage confidently in the long-term caring for and giving back to the land, and everyone has the opportunity to connect or reconnect with the land, especially those who have been displaced from or deprived of land. We feel that people's engagement and connection to the land ensures clean water, clean air, healthy soil, and diverse habitats for thriving communities, fish, and wildlife.

Information Gathering

To better inform this plan we reached out to community members, community leaders, owners of farms and forests, other conservation program participants, organizational partners², staff and board. Our intent was to gather a diversity of perspectives to consider when planning for our organization's future, with the aim of embedding equity and inclusion as a founding value in all that we do. After gathering initial input through interviews, surveys, and working sessions, we developed a diverse conservation scope advisory committee comprised of partners, community members, landowners, and community leaders to help shape the strategic

directions, goals, and tactics included in this plan. The findings from this effort, as well as the resulting success criteria and priorities used to guide the development of this plan can be found in Appendices D-F.

Audience

This plan is intended to be a living document that guides District staff and board in conducting our work and helps ensure that policies, programs, services, and decisions are beneficial to people, wildlife, and the environment. We hope that external audiences find this to be a useful document for tracking and holding us accountable in our behaviors, operations and actions.

History

The District was established in 1944 as the Sauvie Island Soil Conservation District to direct agricultural producers to soil conservation technical assistance resources, such as those provided by the federal Soil Conservation Service, known today as the U.S. Department of Agriculture, Natural Resource Conservation Service (NRCS). In 1975, we expanded the scope of our conservation work, including the types of natural resource concerns we address and also our geographic service area, and became the West Multnomah Soil & Water Conservation District. Voters within our service area approved a permanent property tax levy in November 2006, ensuring a stable funding source for our work. Beginning in fiscal year 2007-2008, we grew our staff to provide conservation assistance and resources more broadly throughout our service area.

Soil and water conservation districts across the United States – born out of the need to foster local solutions to national conservation issues such as the Dust Bowl of the 1930's – have a tradition of serving rural communities and private owners of farms and ranches. The origins of the West Multnomah Soil & Water Conservation District are no different. Our work originally centered on providing soil conservation assistance to rural farms on Sauvie Island, which at the time (1944) were just becoming established after the federal installation of levees on the island created the opportunity to farm. The original idea behind soil and water conservation districts was to provide access to new technologies, technical assistance, and financial incentives to local farmers in partnership with the federal Soil Conservation Service. The goal was to address resource concerns that affected farm productivity. Districts were loosely organized by county boundaries within a state and are governed by a locally elected Board of Directors that are organized around district zones to ensure geographic representation across a district's service area (see page 2).

1. Appendix A includes a list of acronyms used in this plan.

2. Appendix C includes a list of current partners and their roles with the District.

Over time, districts evolved with the country's conservation concerns and grew in size and scope to address other resource issues such as water quality, forest health, and habitat diversity. The West Multnomah Soil & Water Conservation District followed this trend, expanding in size to include the urban areas of downtown, northwest, and southwest Portland, and the forests of the Tualatin Mountains and West Hills. The November 2006 tax levy allowed expansion of the District's staff to include professional expertise in urban conservation, habitat conservation, community garden conservation, conservation education, forest conservation, invasive species prevention and control, in addition to existing rural conservation expertise for agriculture. Through this expansion, the District developed programs and assistance centered on rural residences, farms, and forests, as well as neighborhoods, businesses, and communities within the District's urban areas. This LRBP continues the legacy of our assistance to rural private landowners as an important part of the District's conservation work.

However, central to improving upon the scope of our work is understanding our shared history with Black, Indigenous, and other people of color who collectively have been displaced from or denied ownership access to land. As part of our 2019 celebration of our 75th anniversary as a soil and water conservation district, we released the paper [Whose Land is Our Land? Spatial Exclusion, Racial Segregation, and the History of the Lands of Western Multnomah County](#) researched and written by 2019 Field Conservationist Intern Indi (Keith) Namkoong. This research spotlights the challenge of pursuing equitable and inclusive outcomes in an area that has inherited roughly two centuries of legal, institutional, and economic factors that have inequitably distributed land and access to natural resources to predominately white communities. By synthesizing existing historical scholarship in a literature review focused on western Multnomah County, we identified how barriers to property ownership for Native Americans, Asian Americans, Black Oregonians and other people of color were created and reinforced throughout the 19th and 20th centuries.

These systemic barriers have consistently made this region's land and natural resources available to white communities while withholding them from communities of color; a pattern of inequity which persists today; the color of one's skin remains a strong predictor of whether one owns land in our district and of the environmental resources and hazards present in one's neighborhood. In examining our own policies and activities, we found that the District's work has reflected and was reinforced by these patterns of racial segregation. By focusing our efforts on privately-owned larger properties and the people who own them, we have been investing in and led by predominantly white communities while missing

opportunities, needs, and voices present in our racially diverse communities. These findings will inform the District's strategy as we build diversity, equity, and inclusion into this Long Range Business Plan, and we hope that they may foster critical inquiries around race, land, and equity in our broader professional community. Acknowledging this shared history sets the stage for deconstructing systemic and institutional racism so it does not enter our work going forward. Our Land Acknowledgement and our Racial Equity statements below remind us of this commitment to be antiracist in our work.

Land Acknowledgement

It is important to acknowledge the original Indigenous people of the land that falls within our service area. We honor the original Indigenous people by committing to work with their descendants and learn from their traditional ecological knowledge and relational world view of the land and all things living upon it.

The West Multnomah Soil & Water Conservation District acknowledges the original people whose land we are utilizing today; the Clackamas Chinook, the Willamette Tumwater, the Wasco-Wishram, the Watlata, the Multnomah, and other Chinookan peoples, as well as the Tualatin Kalapuya, the Cayuse, the Molalla, the Yakama, and other tribes and bands of the Columbia and Willamette Rivers. It is important to acknowledge these original inhabitants of the land that falls within our geographic service area now known as the City of Portland, Sauvie Island, and the Tualatin Mountains. We further recognize that we are here because of the land displacement, cultural erasure, and the other sacrifices that were forced upon them. We also remind ourselves that we are guests of this land and must do our best to honor the original peoples through authentic cultural narratives and continued caring of, and giving to, the air, water, plants, animals, and the ecosystems that make up this land community. To follow this acknowledgement with action, we will pursue impactful partnerships with Indigenous people, tribes and their sovereign governments, and inter-tribal organizations. 🌱

Equity and Inclusion

Commitment

As summarized above, our District has taken the initiative to review the history of racial disparity in Oregon and how this history persists in the form of unconscious biases and cultural barriers that contribute to disparities in how we work, with whom we work, and who we serve. We recognize that gaining the perspectives of, and working with, Black, Indigenous, and people of color the District will increase our organization's overall strength. The District acknowledges

that racism must be assertively rejected for long-term change to take place. We understand that as we deepen our ability to understand and eliminate racism, we are better equipped to transform individual actions, systems, and institutions to enhance equity outcomes for all. While the District leads with race, we recognize that many other forms of marginalization and oppression are perpetuated by institutions, individuals, and other forms of traditionally white dominant cultures. We maintain an approach that recognizes that all oppressions are inter-connected. The District is committed to actions that lead to increased diversity, equity, and inclusion outcomes for all.

Racial Equity Statement

VISION | The West Multnomah Soil & Water Conservation District is a culturally inclusive organization that welcomes and engages people of color in all facets of our organization, activities and programs. The Board and staff of the District, the customers we serve, the contractors we hire and the people who benefit from our work resemble the racial diversity found within our service area. The District reaches out to communities of color to determine their conservation priorities for the purpose of enhancing livability through healthy soil, clean water, and diverse habitats. We willingly share with others our experiences in pursuing racial equity.

NEED | Our District has taken the initiative to review the history of racial disparity in Oregon, and how this history persists in the form of unconscious biases and cultural barriers that contribute to disparities in how we work, with whom we work, and whom we serve. We recognize that gaining the perspectives of, and working with, communities of color will increase our organization's overall strength. By working proactively and deliberately to be equitable and inclusive, we will be more successful in our work.

ACCOUNTABILITY | We will hold ourselves accountable to racial equity by addressing disparities when found, and by developing, implementing, tracking and reporting on racial equity goals. Priorities include fully understanding the demographics of the communities we serve, developing new and lasting partnerships with communities of color and organizations that represent them, and recruitment and retention of people of color on our Board, staff, and supporting committees.

Principles for the Advancement of Diversity, Equity, and Inclusion

INCLUSIVITY | The District is an inclusive organization that welcomes and engages all people in all facets of our organization, activities, and programs.

DIVERSITY | The Board and staff of the District, the contractors we hire, and the people who benefit from our work reflect the demographics of our service area.

ENGAGEMENT | The District meaningfully engages historically marginalized communities in our decision making, programs, and policy.

ACCOUNTABILITY | The District works proactively and deliberately to understand and advance equity outcomes.

FOCUS | The District will lead with racial inclusivity, diversity, equity and accountability actions and policies that result in positive outcomes for all. 🌱

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. 🌱

Strategic Directions, Goals, and Tactics

Strategic Directions define the scope of our work. Strategic Directions #1-3 – Equity and Inclusion, Organizational Health and Financial Sustainability – are foundational and necessary for the long-term success of the District. Strategic Direction #4 – Sharing Conservation Information – intersects and supports all of the strategic directions, especially the remaining conservation strategic directions: Water and Soil (#5), Habitats and Biodiversity (#6), Working Farms, Forests and Gardens (#7), Climate Change (#8), Relationships with the Land (#9) and Long-term Success (#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, are each listed 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. Goals and tactics that reflect new areas of work that require more development and capacity building before implementation are *italicized*. Some goals and tactics have references (e.g., SDI) to other related Strategic Directions. For example, SDI relates the goal or tactic to Strategic Direction 1 – Equity and Inclusion.

Some of the District's work is prioritized to occur within defined geographic focus areas (Appendix F). 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 are limited. 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 geographic focus areas depicted in Appendix F pertain to: working lands, priority landscapes, priority habitats, priority watersheds, and priority education focus areas. However, geographic focus areas are not meant to be mutually exclusive or prohibitive of conducting work outside of these areas. 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.

Strategic Directions

1. **EQUITY AND INCLUSION:** Embed equity and inclusion in all that we are and all that we do.

The District believes all people deserve improved quality of life through clean water, healthy soil, and diverse habitats. We seek to welcome, engage, and better serve Black, Indigenous, and people of color (BIPOC) and other historically marginalized communities in all facets of our organization, activities, and programs. By working proactively and deliberately to be equitable and inclusive, we will be more successful in our work.

2. **ORGANIZATIONAL HEALTH:** Ensure we are welcoming, adaptable, supportive, effective, and sustainable in our practices.

Maintaining and enhancing the District's organizational health is paramount to ensuring our ability to carry out our mission. The District seeks to ensure our ability to function effectively and efficiently, to cope adequately, to change appropriately, and to grow from within as well as be influenced from the outside. An important piece of our health is guaranteeing a safe and welcoming environment for our employees and others we work with. To be prepared for upcoming threats and opportunities, our District will continually plan for a sustainable and successful future.

3. **FINANCIAL SUSTAINABILITY:** Ensure we are financially sustainable.

The District will implement an organizational framework that establishes the long-term financial capacity to successfully fulfill our mission while being good stewards of our public funds. The District will manage our finances, budget, contracts and human resources through transparent, efficient, and effective methods that remain fully compliant with all relevant laws and regulations. Best practices will be used to enhance revenues, contain costs and allocate resources strategically.

4. **SHARING CONSERVATION INFORMATION:** Share conservation information so people have the knowledge and confidence to take action.

The District will gather and share conservation information with others so people are confidently engaged in the long-term caring for and giving back to the land. District staff will continue to offer interested land stewards technical assistance and conservation plans. The information we share and the ways we share it will be in alignment with a new culturally-sensitive communications plan that aims to broaden our reach, pursue other ways of understanding conservation and remove barriers to accessing information.

5. **WATER AND SOIL:** Protect and improve water quality and soil health.

The District will engage land stewards throughout our service area to protect and conserve soil and water resources. We will continue to engage with working lands managers, including farms and forests, as well as urban land stewards, including gardeners, to address statewide water quality concerns and improve local soil health. The District will protect and build on the work it has done to improve and enhance watershed health through streambank enhancements. District staff will serve as a convener, collaborative partner, and technical resource in stakeholder conversations and projects that improve water quality.

6. **HABITATS AND BIODIVERSITY:** Protect, enhance, and restore biodiversity, native landscapes, habitats, and ecological function.

Throughout the District, we will maintain and increase native habitat coverage and connectivity. Priority habitat types include lower Columbia estuarine, wetland, Oregon white oak and native pollinator habitats. Priority habitats will be enhanced, maintained and protected. All of these habitat types will be better protected through the District's work to prevent, slow, or stop the harmful impacts from invasive species.

7. **WORKING FARMS, FORESTS AND GARDENS:** Enhance the long-term health and productivity of farms, forests, woodlands, and gardens.

The District will work with land stewards to increase the health of working lands over time. Working forestland managers will be provided assistance with managing lands to reduce competition between trees and enhance forest product outputs. School and community gardens will be offered support that better ensures longevity and productivity. The District will promote resources for farms to enhance efficiency, productivity, and access to markets.

8. **CLIMATE CHANGE:** Promote resilient environments and communities in the face of climate change.

With new and existing partners, the District will proactively address and support climate change actions including wildfire risk reduction, resilient environments, and carbon sequestering efforts. The District will track knowledge of regional and local climate-related trends and responses to assess the need for adaptation of the District's conservation planning, programming and projects. The District will play a part in supporting the intersection of environmental and community resiliency in the Northwest Industrial Portland Harbor and most vulnerable downtown areas.

9. RELATIONSHIPS WITH THE LAND: Enhance, support, and create opportunities for all people, especially those historically and presently displaced from and deprived of land, to foster mutually beneficial relationships with the land.

The District will deliver new initiatives to provide access to and connection with the land, emphasizing those marginalized from such opportunities. School and community garden support has been identified as a key program area that we should further grow and develop to provide a space where community members can nurture reciprocal relationships with the land. The District will seek and support opportunities that provide increased local land access for cultural purposes and other local connections to the land. We will pursue and support efforts that help all people see themselves welcomed in natural areas and playing a part in protecting them.

10. LONG-TERM SUCCESS: Provide for the long-term continuous success of our conservation actions.

The District will promote actions that people can take to maintain conservation projects for the long-term. We will continue to use monitoring to inform how best to protect and enhance the effectiveness of our conservation projects. We will pilot strategies to protect our investment in past projects and ensure continued benefits.

Goals and Tactics

STRATEGIC DIRECTION 1: Embed equity and inclusion in all that we are and all that we do.

GOAL 1.1: Support, foster, and further grow staff, board, and partners' capacity to embed equity and inclusion.

TACTICS:

- a. Support and uphold a committee comprised of staff and board directors devoted to diversity, equity, and inclusion (DEI) who review our policies and actions, seek and encourage staff/board trainings, and work towards continued growth by all within the organization and those with whom we partner.
- b. Provide annual trainings for board and staff on specific DEI topics; develop and deliver a DEI training plan for any new hires.
- c. Devote staff time to DEI work in annual work plans; vet all work plans for opportunities to support DEI through an equity lens review.
- d. Build on the "Whose Land is Our Land" report through events that help share the history uncovered about race, place, and

equity in Multnomah County.

- e. Host a DEI internship to help assess and inform our equity initiatives including staff/board trainings, partnership development, workplan development, DEI committee meetings, and analyzing 2020 census data.
- f. Provide or support at least two inclusivity and equity speaker topics or events per year.

GOAL 1.2: Proactively implement decision-making strategies that lead to more equitable and inclusive outcomes.

TACTICS:

- a. Seek advice from diverse community leaders and members on how to best deliver our work by forming an advisory committee that provides biannual recommendations on our operations and workplans.
- b. Create equity pauses by using the District's Equity Lens prior to all key decision points (i.e., policy change, hiring, hiring practices, employee wellness, organizational health, work plan and budget reviews, and delivery of conservation practices) in order to embed a system of checks and balances that incorporates DEI in every facet of the organization.
- c. Value and implement transparent and shared decision making through a leadership team model and open, publicly accessible, and welcoming board meetings.
- d. Develop and use a land acknowledgement statement to remind ourselves of the history of displacement and cultural erasure faced by the original Indigenous people of the land that falls within our service area, and to acknowledge how this history impacts our work today and sets forth our commitment to address this history in our work going forward.

GOAL 1.3: Work to welcome, increase, and maintain diversity within our board and staff, contractors we hire, and the people who benefit from our work to better reflect the diverse demographics of our service area.

TACTICS:

- a. Analyze results of the 2020 US Census data and 2017 Census of Agriculture to better understand the demographics of the district and use that information to inform strategies that focus on producing more equitable outcomes in the delivery of our services.
- b. Set board and staff recruitment and retention and contract and purchasing award goals around demographic data findings to measure our performance towards achieving a state where

our board and staff, the contractors we hire, and purchases we make at least reflect the demographics of our service area.

- c. *Set up mechanisms, including anonymous platforms, to understand how those interacting with our organization feel about the interaction, with an emphasis on ensuring a welcoming and safe environment. (SD2)*

GOAL 1.4: Ensure broader accessibility and remove barriers to access organizational resources and opportunities at every level of our organization.

TACTICS:

- a. Complete website updates to ensure broader accessibility for all visitors and improve visibility of DEI-related work.
- b. Keep abreast of current and emerging best practices that ensure equity in hiring and use them in our hiring process as appropriate and feasible.
- c. Ensure experiences (lived and professional) are valued criteria for any new hires and that clear expectations are set regarding how they will support and engage in our DEI work.
- d. *Develop and incorporate equitable funding/cost-share models into the delivery of our programs.*

GOAL 1.5: Foster a sense of belonging for all in the environmental sector. (SD 2)

TACTICS:

- a. Showcase diverse partners, professionals, community members, and community leaders sharing a diversity of perspectives in our field.
- b. Support and partner with green workforce development efforts to build coalitions and relationships that help further diversify the environmental field and allow for learning from one another along the way.

STRATEGIC DIRECTION 2: Ensure we are welcoming, adaptable, supportive, viable, effective, and sustainable in our practices.

GOAL 2.1: Ensure the safety and health of our employees, volunteers, partners, and others we work with.

TACTICS:

- a. Affirm that safety and health are our number one priority for our operations, and all employees have a shared responsibility in ensuring a safe and healthy work environment.

- b. Maintain a District Safety Committee consisting of 3 employees with at least one non-management member.
- c. Hold monthly safety trainings and quarterly safety planning and incident review meetings.

GOAL 2.2: Ensure staff and board have sufficient support as well as capacity to adapt.

TACTICS:

- a. Identify and support annual board trainings (SD 1)
- b. Support the development and implementation of annual professional development plans for each staff member. (SD 1)
- c. Provide an internship program that supports all listed SDs in various capacities and helps with overall staff capacity to monitor and maintain priority projects while supporting the continued flow of experience for conservation professionals throughout our entire field. (All Other SDs)
- d. Value and provide staff flexibility in their scheduling and work load management.
- e. Develop board position descriptions and advocacy and community engagement plans that ensure consistent messaging and reach target audiences (SD 1)
- f. Encourage employee cross-training and/or project “showcases” in order to connect staff with the work happening across the district and to develop increased understanding and experience with each other’s work.
- g. Identify internal or external resources that can serve as a back-up for priority work during a period of extended or desired absence of any staff member.
- h. Recognize staff and board achievements, ideally in ways known to be appreciated by the individual being recognized, which may include verbal or written praise or other recognition.

GOAL 2.3: Support and build on opportunities to foster a welcoming environment.

TACTICS:

- a. *Develop and support shared-identity affinity groups that meet our needs. Address affinity group best practices; how to get started and implement shared-identity affinity groups as desired; assess and collaborate on opportunities to convene shared-identity affinity groups with other organizations. (SD 1)*
- b. Make time and space for voluntary staff conversations and check-ins (on equity or otherwise). (SD 1)
- c. Organize and support staff and board social gatherings to get to know one another and welcome one another outside of the work realm.

- d. Dedicate time on board meeting agendas for Director/ Associate Director check-ins.
- e. Develop and implement welcoming recruitment and onboarding procedures for those new to our organization (new Associate Directors, budget committee members, advisory committee members, volunteers, and staff).
- f. *Feature more images of staff, board, partners/people we work with in all publications (welcoming).*
- g. *Create and maintain/update an “Internship Program” web page that showcases the field internship program and current and past interns, as well as a few case-studies of where past interns are currently working. Be sure the many forms of diversity embodied by our interns are well represented.*

GOAL 2.4: Identify and modify District processes that can be made more efficient and/or effective.

TACTICS:

- a. Identify and implement workflow auditing resources such as workflow mapping to help evaluate and manage staff workloads, including examination of applied business models such as task times, project oversight, role of partners and landowners; incorporate changes that lead to efficiencies in time and resources into workplans and job descriptions.
- b. Expand upon organizational chart to demonstrate staff position and administrative workflows to help keep things efficient.
- c. Identify and implement strategies to make administrative processes such as payments, contracting, and payroll more efficient.
- d. Identify new skills needed and obsolete skills that are no longer required for staff positions based on updates to the long range business plan in order to focus education, training, and mentoring of existing employees to enable them to take on new key roles.

GOAL 2.5: Ensure continuity of all District business and processes.

TACTICS:

- a. Maintain clear job descriptions with details such as organizational context, duties, essential areas of responsibility, minimum qualifications, core competencies, preferred knowledge skills and ability, desired interpersonal and professional attributes and work environment.
- b. Cross-train staff in respective specialized duties (or retain outside resources to perform) to ensure uninterrupted services during emergencies or times of extended leave

and periodically swap employees in positions to keep newly acquired skills fresh.

- c. Anticipate staff turnover in key positions (due to retirement or other announced departures) such as the District Manager, Controller, Office Manager, and Senior Conservationist in order to plan for an orderly succession of responsibilities.
- d. Conduct an assessment of office needs and research office location alternatives (including cost comparisons) that would best serve those needs within one year of upcoming lease expiration/renewal dates.
- e. Develop a Business Continuity Plan to guide the District’s recovery in case of disaster. Include risk analysis, disaster preparation and mitigation, guidance on what to do during a disaster, and steps and timeline for recovery efforts following a disaster event.

GOAL 2.6: Increase the environmental sustainability of our operations.

TACTICS:

- a. Identify and implement ways to make office and field supplies and office space more environmentally sustainable while being financially sustainable and efficient.
- b. Encourage staff actions that increase sustainability through individual actions and/or programmatic or operational measures (e.g. managing office compost wastes and recycling).
- c. Create and support employee and contractor programs encouraging alternative forms of transportation and other ways to reduce carbon emissions from our activities.
- d. Examine and upgrade our fleet of vehicles and management thereof with a goal of decreasing our carbon footprint.
- e. Get involved with efforts to increase building sustainability measures (e.g. join tenant group to suggest improvement ideas to management).

STRATEGIC DIRECTION 3: Ensure we are financially sustainable.

GOAL 3.1: Remain fully compliant with local budget law, Oregon public contracting law, financial reporting and audit requirements, and all other laws and regulations pertaining to public entities.

TACTICS:

- a. Manage accounting and finances to maximize efficiency and effectiveness.

- b. Manage development and filing of our budget, ensuring that all local, state, and federal standards and laws are met.
- c. Manage budget development to ensure that the Budget Committee and public are fully engaged in a transparent process that holds us accountable.
- d. Manage budget to ensure that authorized limits are not exceeded.
- e. Report to the board monthly financial results as compared to budgeted amounts, highlighting variances.
- f. Manage annual audit, ensuring that government-wide and fund financial statements are in compliance with accounting standards without exception.
- g. Support Board of Directors to ensure compliance with all public meeting laws and relevant Oregon Revised Statutes.
- h. Manage contracts to ensure compliance with policies and all laws.
- i. Manage human resources and benefits, ensuring compliance with all labor laws and regulations.

GOAL 3.2: Use best practices for budgeting and long-term forecasting, working to enhance revenues, contain costs, and allocate resources strategically.

TACTICS:

- a. Develop an annual budget that supports our mission, strategic goals, and annual work plans
- b. Diversify the Budget Committee to ensure a variety of perspectives are incorporated into the budget process.
- c. Use a financial sustainability lens to examine proposed budget changes and any post-budget adoption requests to better ensure funds are strategically utilized.
- d. Solicit, develop, and maintain support of and engagement with strategic partnerships to leverage our funds and operations while also generating a variety of funding sources.
- e. Look ahead to ensure we can weather financial threats or take advantage of financial opportunities as they arise.
- f. Build sufficient long-term reserves to ensure resiliency during economic downturns and the capacity to support capital projects.

STRATEGIC DIRECTION 4: Share conservation information so people have the knowledge and confidence to take action.

GOAL 4.1: Promote and conduct conservation assessments on non-governmental properties and provide

guidance on voluntary conservation actions that can be taken to improve air and water quality, fish and wildlife habitat, and/or soil health, consistent with the objectives of the property owner or steward.

TACTICS:

- a. Write conservation plans annually for farms or forests to ensure people have the assistance needed to care for healthy and productive working lands.
- b. Promote and create conservation plans that encourage urban and suburban land stewards to work together to address shared conservation issues across habitat areas of 1 acre or greater to support people in caring for the land, watersheds, and wildlife in a collective and community-led manner.
- c. Encourage property owners who have hosted invasive species treatments to have a conservation plan developed for their property (for properties greater than 1 acre) or to enroll in the Backyard Habitat Certification Program to better ensure holistic restoration.
- d. Encourage property owners who are hosting Healthy Stream or Healthy Habitat projects on their property to have a conservation plan developed for their property to better address natural resource issues throughout the entirety of these properties.
- e. *Craft and share simplified messaging about our conservation planning services and partner offerings targeting both current and underserved audiences (including renters) to increase planning access and participation throughout the district. (SD 1)*
- f. Provide technical assistance and planning at sites (e.g., private businesses, schools, community gardens, etc) that wish to demonstrate effective conservation practices. (SD 9.1)

GOAL 4.2: Produce and promote understandable and easy-to-find educational materials about conservation and our services.

TACTICS:

- a. *Craft and implement a communications plan that includes sharing information about our services, soil and habitat health, and other relevant topics via Community Engagement Liaisons (CEL)-identified channels including radio stations, community newsletters, and social media, in CEL-identified languages.*
- b. Present conservation topics to the public at four to five partner-led conferences or events annually, including, for example, Oregon State University (OSU) Tree School, Oregon Zoo Education Center, Trillium Festival and Neighborhood Association events.

- c. Redesign the district's website so that it is easy to navigate and provides visitors with relevant, engaging information about conservation and clearly shows the services we offer.

GOAL 4.3: Seek and support opportunities to recognize Traditional Ecological Knowledge (TEK) as being important to understanding the landscape and to learning and applying traditional teachings.

TACTICS:

- a. Foster expansion and diversity of staff conservation knowledge by seeking and supporting Indigenous-mentored opportunities to learn and practice working with the land using TEK.
- b. Develop relationships with Indigenous community members, leaders, and culturally specific organizations including partner Tribal advisory committee members to increase collaborative and respectful discussions about working with and giving back to the land.
- c. Explore and pursue opportunities for staff and/or board tribal liaisons positions.

GOAL 4.4: Increase awareness among district farmers, foresters, other rural land managers, gardeners, backyard habitat providers, and students of the importance of healthy soil for people and ecosystems, and educate them about ways to impact contemporary conservation topics.

TACTICS:

- a. Host an annual event (i.e. Soil School) with presentations on a broad range of topics related to priority contemporary conservation issues. Include expert speakers from multiple disciplines, including from local tribes. Offer translation services.
- b. Consult CELs for other contemporary conservation topics and platforms/mediums relevant to their communities, and for broader outreach to promote our workshops to communities beyond those we already know.

GOAL 4.5: Work with 4-County Cooperative Weed Management Area to gain immigrant, refugee, and Indigenous community leaders' perspectives related to invasive species, and develop and adopt culturally-sensitive management approaches and messaging.

TACTICS:

- a. Review priority weed list for Early Detection and Rapid Response (EDRR) and learn more about the origins of these plants (e.g., What are their medicinal qualities, their first food qualities for immigrant Indigenous communities, and/or their naturalized use by other communities?).

- b. Gain an understanding of the relationship Indigenous communities have with our target species, and discover if this understanding shifts our priority ranking of species for control or our tactics (i.e., use of herbicides) of control for some EDRR species?
- c. Develop and distribute education and outreach materials, as well as shared messaging used by partner organizations, that respond to expressed community concerns about the overly complex, xenophobic, and colonial (i.e., elitist, alarmist) language used.

GOAL 4.6: Promote and support demonstrations of easy-to-implement conservation practices urban residents can adopt to improve water quality and soil health, and enhance wildlife habitats. (SD 5)

TACTICS:

- a. Provide annual funding and technical support for partner-led educational events like Stormwater Stars and Watershed 101 workshops that provide hands-on demonstrations of conservation practices.
- b. Support annually at least one high-value educational demonstration project or event such as the Tryon Creek Watershed Wide Event that provides hands-on demonstration, community engagement, and public access.

GOAL 4.7: Encourage collaboration, strengthen staff expertise, and promote adaptive management principles. (SD 10)

TACTICS:

- a. Encourage staff participation in conservation-focused partner dialogs.
- b. Encourage staff participation in conservation and ecology-focused conferences and other peer learning events annually.
- c. Seek, support, and share data collection and mapping efforts that support conservation implementation and prioritization.

STRATEGIC DIRECTION 5: Protect and improve water quality and soil health.

GOAL 5.1: Assist farms, livestock and horse operations, and ranches with comprehensively addressing water quality concerns based on Oregon Department of Agriculture's (ODA) agricultural water quality standards.

TACTICS:

- a. Implement our conservation efforts while adhering to the ODA Agricultural Water Quality Management Plan including identifying focal areas and management concerns.

- b. Assist with manure management, livestock fencing, management of heavy use areas, stormwater management on agricultural buildings, and other practices aimed at addressing non-point source agricultural water quality pollution in the North Coast, Tualatin, and Lower Willamette Agricultural Water Quality Management Area Plans. (SD5)
- c. Promote and support stream and waterway (vegetative) buffers and off-stream water for livestock to protect water quality (e.g. filter nutrients from fertilizer and manure and minimize erosion) and habitat on farmland (SD5).

GOAL 5.2: Encourage farms, forests, and community gardens throughout the district to implement practices that conform to at least one of the four principles of soil health – maximize continuous living roots, minimize disturbance, maximize soil cover, and maximize biodiversity – in order to protect viability and resilience on our productive lands and ensure that less pollution and sediment end up in our waterways.

TACTICS:

- a. Improve soil health on farmland using regenerative techniques to protect water quality, increase fertility, decrease nutrient requirements, absorb and hold water, reduce pest/disease management, provide habitat for beneficial insects, store carbon, prevent erosion, and to create climate change resiliency.
- b. Improve soil health on community and school gardens using regenerative farming techniques that improve water quality outputs and increase carbon storage.
- c. Improve soil health on forestland to increase carbon storage, provide increased wildlife habitat, and decrease erosion.
- d. Provide financial incentives to improve soil health through cost-share, grant funding, federal incentive payments (e.g., NRCS Soil Health CIS) and other incentive programs such as OWEB grants and/or ODA funding.

GOAL 5.3: Maintain and widen riparian buffers on streams within priority watersheds and restore diverse native plant communities and habitat features (e.g., snags and downed wood) within buffers to help filter sediment and other pollutants, control streamside erosion, and provide shade as well as important fish and wildlife habitat. (SD 5 and 10)

TACTICS:

- a. Monitor, maintain, and enhance (approximately 25) Healthy Streams Program projects, with particular

emphasis on McCarthy Creek, to increase streamside habitat function and the viability and health of watersheds.

- b. Add new riparian restoration projects in priority watersheds (Abby Creek, Balch Creek, Crapapple Creek, McCarthy Creek, Rock Creek, Tryon Creek, and Sauvie Island), as landowner interest, staff capacity, and resources allow, particularly where contiguous habitat will be added. Identify funding sources or partnerships that allow for expanded staff capacity and implementation of these riparian restoration efforts. (SD 5 and 10)
- c. Plan and implement upland forest restoration practices within priority watersheds to protect and enhance small stream tributaries and drainages through the control of invasive species and planting of trees and understory vegetation.
- d. Encourage landowners who wish to conserve or restore riparian habitats to enroll in the Riparian Lands Tax Incentive Program.

GOAL 5.4: Serve as a convener, active partner, and technical resource with key stakeholders, such as the City of Portland, Sauvie Island Drainage Improvement Company, moorage communities and community watershed committees, that directly impact water quality within the district.

TACTICS:

- a. Facilitate a discussion with key stakeholders on stormwater permitting, policy, and processes that emphasizes holistic sub-watershed issues in Portland's West Hills so as to identify opportunities that better protect and enhance water quality and ecosystem function, reduce local flooding, and respond to continued development and redevelopment.
- b. Facilitate a discussion with the Sauvie Island Drainage Improvement Company (SIDIC) on how to reduce nutrient loading in the SIDIC canal system, reduce erosion and loss to canal integrity and conveyance due to improper canal maintenance, and maintain and restore riparian habitats along SIDIC canals.
- c. Provide outreach, information, technical assistance and cost-share, grant funding, federal incentive payments (via NRCS) to livestock operations, horse facilities, and forest owners.
- d. Partner with Scappoose Bay Watershed Council to provide outreach, education, technical assistance and possibly cost-share, grant funding, federal incentive payments (via NRCS) to landowners – including the moorage community – in projects and practices along the Multnomah Channel that benefit water quality.

- e. Partner with and provide funding to the Watershed Resource Center to engage with homeowners, tenants, businesses and other organizations interested in implementing stormwater runoff projects (e.g., Stormwater Stars Program) that benefit water quality and native habitat coverage in our shared service area.
 - f. Collaborate with City of Portland Bureau of Environmental Services (BES) staff and nonprofit partners, including watershed councils, on stormwater projects that intersect public and private jurisdictions to leverage funding and technical capacities (i.e., 1% for Green Project and Boones Ferry Crossing).
 - f. Remove and replace invasive species with diverse and healthy native plant communities in priority habitats emphasized in the Regional Conservation Strategy including riparian and late-successional conifer forest habitats vulnerable to secondary waves of invasion.
 - g. Participate in and support regional habitat connectivity coordination efforts such as The Intertwine Alliance's Regional Connectivity Working Group and provide resources to help develop and implement regional strategies.
- GOAL 6.2: Prevent, slow, or stop the loss of native habitats to biological invasions.**

STRATEGIC DIRECTION 6: Protect, enhance, and restore biodiversity, native landscapes, habitats, and ecological function.

GOAL 6.1: Maintain and increase native habitat coverage and connectivity throughout the district. (Goals 6.3-6.5, addressing wetland, lower Columbia River estuarine, Oregon White Oak and native pollinator habitats)

TACTICS:

- a. Conserve, enhance, and restore priority habitats such as lower Columbia River estuarine, wetlands, oak prairie, and native insect habitat features to support connectivity and ecosystem functionality throughout and beyond the district.
- b. Collaborate and provide funding to key partnership initiatives focused on maintaining and increasing native habitat coverage and connectivity (as well as improving water quality) throughout the district such as the Backyard Habitat Certification Program, the Greater Forest Park Conservation Initiative, the West Willamette Restoration Partnership, and the Tryon Creek Watershed Council. (SD 5)
- c. Promote the adoption and maintenance of residential-scale nature-scaping, meadow-scaping, oak-scaping, rain gardens, and other urban habitat projects by making newly-created and existing educational resources more available to the public through awareness raising activities and other measures including targeted outreach, translation of materials, workshops, events, simplified how-to guides, videos, and technical assistance. (SD4)
- d. Provide onsite planning advice to urban residents interested in stewarding urban habitats with an added emphasis on reaching those historically underserved through targeted outreach and tailored programming.
- e. Encourage forest management near headwater streams that fosters the development of older forests.

TACTICS:

- a. Cooperate with, support, and provide as applicable technical and financial resources for regional surveys of Early Detection, Rapid Response (EDRR) invertebrate species such as gypsy moth, emerald ash borer, Asian longhorned beetle, Japanese beetle, and spotted lanternfly. Include eradication efforts when found.
- b. Review and update the EDRR priority weed list biannually, prioritizing those we might prevent establishment of or eradicate within our district (SD 4.5)
- c. Survey for EDRR weed species as well as non-EDRR weed species in priority habitat where they are not yet established and eradicate when found. Conduct follow-up restoration practices at priority sites.
- d. Cooperate with, support, and provide as applicable technical and financial resources to community science and related volunteer early detection survey efforts such as Weed Watchers and Forest Pest Detectors. Include the moorage community for the early detection of EDRR aquatic invasive species.

GOAL 6.3: Enhance, maintain, and protect wetland and Multnomah and Columbia River floodplain habitats including wet prairies for the benefit of water quality, amphibians, juvenile salmonids, waterfowl, turtles, and other fish and wildlife species.

TACTICS:

- a. Conduct conservation planning and site management to steward the Sturgeon Lake Restoration Project to ensure this system and the wildlife depending upon it are thriving.
- b. Conduct conservation planning and site management to steward lower McCarthy Creek Restoration Projects including the 120-acre U.S. Department of Agriculture, Natural Resources Conservation Services' Wetland Reserve Easement to continue enhancement and maintenance of this important watershed.

- c. Work with partners to seek new and protect active projects that restore critical and unique floodplain and wetland habitats along the Columbia River and Multnomah Channel, consistent with the needs of identified priority species.

GOAL 6.4: Conserve and restore Oregon white oak prairie, savanna, and woodland habitats.

TACTICS:

- a. Identify quality oak habitat on private lands and conduct targeted education and outreach to the landowners who own these habitats. Develop and apply tools (e.g., right of first refusal agreements, easements) that secure habitat conservation and prevent the loss of these habitats to agricultural, non-oak forestry, and development – especially when properties are put up for sale.
- b. Promote the retention of mature Oregon white oak trees within neighborhoods, urban development, and farms through education and outreach.
- c. Manage existing and future investments in newly-created oak savanna and associated hedgerows at the lower McCarthy Creek Wetland Reserve Easement site and support landowners with active, existing oak habitat restoration projects through financial and technical assistance.
- d. Provide incentives for habitat restoration and enhancement such as cost-share, grant funding, federal incentive payments (NRCS), and other economic offsets to project costs. Work with new landowners to restore habitat through the planting of new Oregon white oak seedlings and enhance accompanying habitat in suitable locations, prioritizing large sites.
- e. Co-lead a regional effort (with Clackamas Soil and Water Conservation District) to bring back a fully functional Wildlife Habitat Conservation and Management Program (a wildlife habitat tax deferral program of the Oregon Department of Fish and Wildlife) as a key incentive to conserving, enhancing, and restoring priority habitat such as Oregon white oak prairies and savannas.
- f. Participate in and support regional oak habitat coordination efforts such as The Intertwine Alliance Oak Prairie Work Group and provide resources to help develop and implement regional strategies such as oak habitat mapping and oak habitat education and outreach.

GOAL 6.5: Protect and enhance regional pollinator, native insect, and plant biodiversity.

TACTICS:

- a. Implement pollinator habitat projects on farms, forests, gardens and neighborhoods to increase overall habitat

coverage for these critical species throughout the district.

- b. Implement new understory seeding projects by converting bare ground and invasive monocultures into diverse forest understories to provide needed habitat, erosion control, and increase local groundcover plant diversity.
- c. Integrate herbaceous plantings and bare ground into all habitat projects, where feasible and appropriate, to further enhance native insect habitat.
- d. Engage in partnerships that promote native insect habitat (e.g. The Oregon Bee Project) and support landowners enhancing pollinator and other native insect habitat on farms, forests, and gardens.

STRATEGIC DIRECTION 7: Enhance the long-term health and productivity of farms, forests, woodlands, and gardens.

GOAL 7.1: Assist working forestlands to reduce competition in young forest stands and enhance diversity, adaptability, and resiliency of merchantable forest tree species that generate forest products.

TACTICS:

- a. Regularly support and implement forest stand enhancement projects with developed conservation plans centered on regenerative techniques that allow for continued health and productivity.
- b. Assist in effective management of Douglas-fir and western redcedar forests while also educating landowners on the ecological benefits and economic opportunities of growing red alder, bigleaf maple, and other species.
- c. Support landowners in thinning dense forests to release healthy trees by controlling competition.

GOAL 7.2: Partner on efforts that ensure the long-term health of school and community gardens. (SD 9.1)

TACTICS:

- a. Provide direct planning assistance to school and community gardens to ensure they have the knowledge and resources to maintain healthy land.
- b. Work with other stakeholders to manage school and community gardens long-term in a way that provides for the sustained access of thriving garden spaces.
- c. Provide technical and financial support for schools to incorporate environmental education programming into their lessons to better connect people with the land and its care.

GOAL 7.3: Assist farms, livestock operations, ranches, and horse owners to maintain and enhance the productivity and long-term health of the land.

TACTICS:

- a. Promote and share technical and funding resources (from OSU, ODA and NRCS) offered by partners to enhance productivity, marketing and access to markets for producers (e.g., ODA Specialty Crop Block Program, Farmer's Markets, etc).
- b. Promote on-farm irrigation, integrated pest management, and energy efficiency to reduce carbon footprints, decrease wildlife and water quality impacts, decrease local air pollution, conserve financial resources and increase the marketability of farms with potential certifications (e.g., Organic, Salmon Safe, etc).

STRATEGIC DIRECTION 8: Promote resilient environments and communities in the face of climate change.

GOAL 8.1: Address wildfire risk and landscape resiliency to wildfire.

TACTICS:

- a. Promote and advocate for the update and implementation of a wildfire risk reduction plan for Forest Park and surrounding neighborhoods that identifies and creates essential fuel breaks in key areas along the outermost areas of Forest Park that abut neighborhoods and residences such as Linnton.
- b. Partner with OSU Extension, Oregon Department of Forestry (ODF), and Portland Fire & Rescue to deliver information and outreach on wildfire risk reduction to urban and rural neighborhoods abutting large areas of natural vegetation or open space. Include information tailored to our local ecology on reducing wildfire fuels within 100-300' of homes, the benefits of native plants, and species particularly impacted by climate change. (SD 4)
- c. Partner with Portland Fire & Rescue, ODF, and Tualatin Valley Fire & Rescue to provide Home Risk Assessments, prioritizing areas where fire risk reduction would have the greatest impacts, and offer technical and financial assistance to residents who are implementing high priority actions.
- d. Promote the creation of 1-2 new Firewise communities like Linnton in neighborhoods facing threats from wildfire that may ignite in large nearby areas of natural vegetation or open space.

GOAL 8.2: Help farms, working forests, and community and school gardens adapt to climate change by encouraging conservation practices that support resilient environments and sequester carbon.

TACTICS:

- a. Understand unfilled niches and needs we might address through proactive discussions with working land owners and key partners to ensure efforts are strategic and leveraged and better assure we reach a broader audience.
- b. Market our technical offerings that lead to increased resilience, including building soil health, riparian and pollinator habitat plantings that increase biodiversity and sequester carbon, integrated pest management, active forest management, and irrigation efficiency.
- c. Ensure all conservation plans and most technical requests include guidance on how land stewards can improve soil health and plant and protect trees and other vegetation adapted or appropriate for the site conditions through the development of shared conservation guidance that can be used as a climate change response lens.
- d. Develop partnerships with organizations committed to providing ecosystem service payments to landowners who sequester carbon, and assist with relevant field measurements and conservation planning.
- e. Update relevant content on website and other publications to refer to climate change and facilitate actions that support a resilient environment.

GOAL 8.3: Increase community resiliency to climate change in the Northwest Industrial/Portland Harbor and most vulnerable downtown areas.

TACTICS:

- a. Develop partnerships with stakeholder groups to identify priorities and assess needs, and work on both sides of the Willamette River by developing a coordinated initiative with the East Multnomah Soil & Water Conservation District.
- b. Promote actions that reduce the urban heat-island effect such as protecting mature urban trees, planting trees and other vegetation, depaving, and installing green infrastructure including ecoroofs and planters in areas with low canopy cover and high levels of impervious surface.
- c. Support urban planning and/or engineering strategies shown to be effective at improving air quality, reducing runoff, and creating urban native habitats.

GOAL 8.4: Increase internal capacity to understand and impact climate change

TACTICS:

- a. Support staff in attending at least one climate change-focused training event annually.
- b. Support staff in participating in strategic partnerships and collaborations that seek to impact climate change through conservation actions.

STRATEGIC DIRECTION 9: Enhance, support, and create opportunities for all people, especially those historically and presently displaced from and deprived of land, to foster positive relationships with the land.

GOAL 9.1: Support school and community gardens, especially in the most racially diverse neighborhoods in our district, as a place where students and families can nurture reciprocal relationships with the land. (SD 7.2)

TACTICS:

- a. Collaborate with partners, including OSU Extension Farm to School Team, Portland Parks & Recreation, Portland Public Schools, and East Multnomah SWCD, to assess what niche we could fill or support to help ensure people's access to community and school gardens.
- a. Develop a comprehensive list of all schools in the district, assess demographic, socioeconomic and garden/environmental funding needs for each, and reach out to key partners or stakeholders, including Portland Public School District and East Multnomah SWCD, to develop an equitable decision-making framework for allocating funding.
- b. Secure necessary funding (based on findings from 1.a and b) from greater internal budget allocations and possibly external grant funding and develop a more stable funding model for school gardens so schools can plan their garden education program more long-term (SD 1).
- c. Develop welcoming garden signage for use at the school and community gardens we support, translated into languages used in our district so families with English as a second language will know that these are community spaces where they are welcome and invited to participate.

GOAL 9.2: Assess and address opportunities that provide increased land access for cultural purposes and other local connections to the land.

TACTICS:

- a. Engage with local tribes and tribal groups early in program development and planning processes to learn more about what they see as cultural resources in our area and how we can provide for these resources through our operations.
- a. Develop relationships and work with culturally specific organizations including HAKI Community Organization, Wisdom of the Elders, Verde and Native American Youth and Family Center (NAYA) along with immigrant community members, landowners, and other partners to understand how we might facilitate access to land to fulfill cultural needs, how we might connect willing landowners with community members seeking more local access, and inform our role in delivery of this goal.
- b. Connect willing landowners with available acreage to those in need of access to lands to manage to harvest medicines and traditional foods with and for Indigenous groups.
- c. Integrate and collaborate on opportunities to address cultural needs through school and community garden efforts (SD 8.2 and Goal 9.1)

GOAL 9.3: Support efforts that help all people see themselves in natural areas, demonstrate that these places are for them, and convey that all people can play a role in protecting and enhancing these areas.

TACTICS:

- a. Support youth environmental education programs that connect diverse community members with natural areas and conservation actions (e.g., Friends of Tryon Creek, Jackson SUN, Ecology in Classrooms and Outdoors, Salmon Watch, Camp ELSO, etc.) (SD 1 and 4)
- b. Partner on local conservation and education events such as Tryon Creek's Trillium Festival that connect community members with conservation. (SD 1 and 4)
- c. Collaborate on outreach to Home Forward and other rental and low-income housing partners to let them know that our services and our partners (such as the Backyard Habitat Certification Program) are available to help them manage their land (SD 1, 7 and 4)
- d. Reach out to businesses nearby to the District office to take them on "lunchtime learning" walks to engage and build relationships with these businesses and the diverse clients they serve.

STRATEGIC DIRECTION 10: Ensure the long-term success of our conservation actions.

GOAL 10.1: Promote actions people can take to maintain the benefits from conservation projects and resources that they can use to help manage their own lands for conservation value long-term.

TACTICS:

- a. Strengthen partnership with OSU Extension and other organizations to educate landowners on forest, farm, and community garden conservation
- b. Emphasize the actions that landowners can take on their own to manage weed species, enhance growth and vigor of their crop, and protect the water and soil
- c. Work with Coalition for Clean Rivers, City of Portland, and other NGO partners to share messaging and resources that encourage and facilitate simple actions individuals can take to realize conservation benefits.
- d. Learn from and build on efforts that facilitate long term care of conservation projects through staff and partner sharing, assessment of monitoring, and surveying conservation project participants.
- e. Work with Backyard Habitat Certification Program (BHCP) to assess expansion to larger urban and suburban properties to provide interested owners and tenants with larger acreage access to BHCP's long-term incentives and check-ins that are currently only available to landowners who own an acre or less of land.

GOAL 10.2: Monitor the effectiveness of our conservation projects and respond to findings with an adaptive management approach to conservation.

TACTICS:

- a. Annually monitor and maintain the conservation values protected by the permanent conservation easements on private lands for the Sturgeon Lake Restoration Project.
- b. Strategically monitor restoration sites to track the successes and threats facing our projects, such as invasive species infestations, and deliver monitoring results to project managers promptly for use in adaptive management.
- c. Hold an annual tech staff meeting to debrief on monitoring findings and approaches to adapt site management.
- d. Participate in the Unified Monitoring Protocol for the Greater Forest Park Conservation Initiative (GFPCI) and report findings for compilation in the GFPCI Year Impact Report.

- e. Monitor stream temperature on Miller, McCarthy, and Crabapple Creeks during the spring, summer, and early fall months to better understand the impacts from conservation actions, roads, development, and climate change to inform our future conservation actions alongside other available data.

GOAL 10.3: Identify the types of long-term agreements we should use to secure conservation benefits from our projects and actions for the long-term, and the organizational capacity and infrastructure needed to use them.

TACTICS:

- a. Conduct a survey of landowners to better understand project successes and failures and to assess their willingness to enter into long term conservation agreements as a means to protect projects for the long term.
- b. Work with NRCS' Conservation Stewardship Program (CSP) to learn what is required to start a program with our partners that follows CSP principles (i.e., awarding the most successful and sustainable projects and encouraging continued management and protection of the awarded lands).
- c. Research what is required to develop local carbon markets for soil building and forest conservation measures.
- d. Research the types of long-term agreements – such as conservation easements – that are used, or could be used, to protect investments in conservation.
- e. Identify priority focal areas and habitats that have properties of significant conservation value that would benefit from the use of long-term conservation agreements. Develop criteria for ranking prospective properties based on their conservation value for priority habitats such as wetlands, wet prairies, oak prairie and woodlands, riparian and older conifer forest as well as their value in providing educational and management demonstration opportunity consistent with their conservation value.
- f. Enter into 1 or 2 pilot long-term conservation agreements as a means to identify the partnerships and our administrative, legal, and monitoring capacity needed to enter into and enforce long-term conservation agreements 🌱

Implementation and Performance

This is a 5-year strategic plan that will be implemented through the District's annual work planning and budget adoption process for fiscal years 2021-22, 2022-23, 2023-24, 2024-25 and 2025-26. This process precedes the District's

fiscal year which runs from July 1st through June 30th. Each January preceding the beginning of the fiscal year, District staff develop annual work plans for the upcoming fiscal year. The annual work plans determine which strategic directions and goals each staff member will be implementing through their programs of work. Annual work plans are derived from and further define the goals and tactics, and contain the timing and staff and partner resources needed to implement them. Staff then develop program budgets to identify the funds needed to implement the annual work plans, which are compiled into the District's proposed balanced budget which is presented to the District's Budget Committee. The Budget Committee then discusses and recommends an approved budget for consideration by the District's Board of Directors. The Board then further discusses and adopts a final budget in June.

Not all LRBP goals or tactics will be implemented in any given year; as a reminder those *in italics* are those goals and tactics that the District has to build capacity in order to implement. Performance of LRBP implementation will be assessed according to the measures of success identified for each strategic direction as described below. The measures of success are a combination of measurable or descriptive criteria that define the desired level of progress the District would like to achieve with respect to each strategic direction. The measures of success will be evaluated annually as either being "successful" (i.e., the measure of success was achieved or exceeded), "in progress" (i.e., some accomplishment on the measure of success but not full achieved) or "needs improvement" (i.e., progress was not made). The annual evaluation will include a listing of the factors encountered that led to "in progress" or "needs improvement" outcomes.

Measures of Success

STRATEGIC DIRECTION 1: Embed equity and inclusion in all that we are and all that we do.					
Success Criteria	Measures of Success				
	LRBP Year 1	LRBP Year 2	LRBP Year 3	LRBP Year 4	LRBP Year 5
Internal staff and board diversification and capacity development	Plan developed for a diverse advisory committee; Capacity developed with trainings and facilitated discussions	Relationships developed with potential advisory committee members; Analysis of 2020 census and District demographic data completed	Form and convene a diverse standing advisory committee; Set board and staff diversification goals	Convene formed advisory committee	Convene formed advisory committee
Service benefits are increased for historically underserved communities	District-wide assessments of program benefits and access issues	Develop plans to address assessment findings. Complete website accessibility and other updates	Annually evaluate the distribution and receipt of benefits with advisory committee		
Favor the award of contracts for hired services and other purchases from Minority Business Enterprises (MBE) and Women Business Enterprises (WBE)	Evaluate the % of contracts and purchases from MBE and WBE with respect to number and value awarded	Maintain or increase % contacts and purchases from MBE and WBE			

STRATEGIC DIRECTION 2: Ensure we are welcoming, adaptable, supportive, viable, effective, and sustainable in our practices.

Success Criteria	Measures of Success				
	LRBP Year 1	LRBP Year 2	LRBP Year 3	LRBP Year 4	LRBP Year 5
Staff work-life balance	Staff surveys show they feel healthy about work-life balance; Create and evaluate realistic annual work plan; Ensure regular communication-feedback processes	Create and evaluate realistic annual work plan; Ensure regular communication-feedback processes	Staff surveys show they feel healthy about work-life balance; Create and evaluate realistic annual work plan; Ensure regular communication-feedback processes	Create and evaluate realistic annual work plan; Ensure regular communication-feedback processes	Staff surveys show they feel healthy about work-life balance; Create and evaluate realistic annual work plan; Ensure regular communication-feedback processes
Safety	All incidents are reported in a timely manner with corrective and preventative action taken				
Efficiency and effectiveness	Maintain detailed job descriptions; Identify and implement workflow auditing; Complete annual performance evaluations	Maintain detailed job descriptions; Identify and implement workflow auditing; Complete annual performance evaluations	Maintain detailed job descriptions; Respond to workflow auditing; Complete annual performance evaluations	Maintain detailed job descriptions; complete annual performance evaluations	Maintain detailed job descriptions; Complete annual performance evaluations; Develop Business Continuity Plan in the event of a disaster
Staff and board feel welcomed	Exit interviews and new staff interviews/surveys report out a welcoming environment	Affinity group needs and potential partners are identified	Develop and support affinity groups that meet our needs. Website updates show a wider diversity of perspectives	Develop and support affinity groups that meet our needs	Develop and support affinity groups that meet our needs

STRATEGIC DIRECTION 3: Ensure we are financially sustainable.

Success Criteria	Measures of Success				
	LRBP Year 1	LRBP Year 2	LRBP Year 3	LRBP Year 4	LRBP Year 5
Remain fully compliant with all laws and regulations pertaining to public entities.	Independent audit of financial statements resulting in clean audit opinion and finding that District is in compliance with relevant laws and regulations				
Use best practices for budgeting and forecasting, working to enhance revenues, contain costs, and allocate resources strategically.	Annually receive the Government Finance Officers Association's Distinguished Budget Presentation award				

STRATEGIC DIRECTION 4: Share conservation information so people have the knowledge and confidence to take action.

Success Criteria	Measures of Success				
	LRBP Year 1	LRBP Year 2	LRBP Year 3	LRBP Year 4	LRBP Year 5
Understandable and culturally accessible	Work with Community Engagement Liaisons (CELs) to develop communications plan	Complete CELs-guided communications plan	Website redesign completed; Translate materials according to communications plan	Deliver a CELs-vetted and -guided communication plan that reaches broader audiences	
Science-based credible information that includes other, non-dominant culture ways of knowing	10 conservation plans completed; Technical staff participate in at least one training or opportunity that involves learning about Traditional Ecological Knowledge (TEK)	10 conservation plans completed; Review feasibility of tribal liaison for board and/or staff	10 conservation plans completed; Technical staff participate in at least one training or opportunity that involves learning about TEK; Pursue tribal liaison for board and/or staff	10 conservation plans completed	10 conservation plans completed; Evaluate invasive species priorities, tactics, and messaging with increased indigenous cultural perspectives gained through regional dialogue

STRATEGIC DIRECTION 5: Protect and improve water quality and soil health.

Success Criteria	Measures of Success				
	LRBP Year 1	LRBP Year 2	LRBP Year 3	LRBP Year 4	LRBP Year 5
Cropland improved	30 acres per year				
Stream length enhanced	Minimum 22,910 feet by Year 5				

STRATEGIC DIRECTION 6: Protect, enhance, and restore biodiversity, native landscapes, habitats, and ecological function.

Success Criteria	Measures of Success				
	LRBP Year 1	LRBP Year 2	LRBP Year 3	LRBP Year 4	LRBP Year 5
Native habitats conserved, enhanced and/or restored	9 acres of priority habitat restored or enhanced	Secure 1 new priority habitat project	1 acre of priority habitat enhanced or enhanced	Secure 1 new priority habitat project	9 acres of priority habitat restored or enhanced
Preventing and/or eliminating new invasive species threats	Annually survey at least 300 properties and respond to any detected priority Early Detection, Rapid Response (EDRR) species found quickly and collaboratively				

STRATEGIC DIRECTION 7: Enhance the long term health and productivity of farms, forests, woodlands, and gardens.

Success Criteria	Measures of Success				
	LRBP Year 1	LRBP Year 2	LRBP Year 3	LRBP Year 4	LRBP Year 5
Working forestlands and farms covered by conservation plans	Annually complete 6 conservation plans				
School and community gardens receiving technical or financial assistance	Annually support 6 school and/or community gardens				

STRATEGIC DIRECTION 8: Promote resilient environments and communities in the face of climate change.

Success Criteria	Measures of Success				
	LRBP Year 1	LRBP Year 2	LRBP Year 3	LRBP Year 4	LRBP Year 5
Wildfire risk reduction	Find niche	Develop partnerships	Deliver localized community wildfire protection plan	Deliver localized community wildfire protection plan	Increase fire wise communities and those w/ completed assessments, evaluate impact
Reduce heat island impacts for those most vulnerable	Find niche	Develop partnerships	Identify projects and actions	Implement projects and actions	Implement projects and actions

STRATEGIC DIRECTION 9: Enhance, support, and create opportunities for all people, especially those historically and presently displaced from and deprived of land, to foster positive relationships with the land.

Success Criteria	Measures of Success				
	LRBP Year 1	LRBP Year 2	LRBP Year 3	LRBP Year 4	LRBP Year 5
People have ways to connect with the land	Find niche to provide school and community garden support	Implement school and community garden programming			
People have access to land	Identify strategies to facilitate land access for cultural benefits	Facilitate and support land access for cultural benefits			

STRATEGIC DIRECTION 10: Ensure the long term success of our conservation actions.

Success Criteria	Measures of Success				
	LRBP Year 1	LRBP Year 2	LRBP Year 3	LRBP Year 4	LRBP Year 5
Monitor restoration sites and respond to findings	40 sites annually				
Maintain and secure long-term agreements	2 total agreements held and maintained (Sturgeon Lake and McCarthy Creek)	2 total agreements held and maintained	3 total agreements held and maintained	3 total agreements held and maintained	4 total agreements held and maintained

APPENDIX A

Acronyms Used in This Business Plan

BES	Bureau of Environmental Services (City of Portland)	ODA	Oregon Department of Agriculture
BIPOC	Black, Indigenous and People of Color	ODF	Oregon Department of Forestry
BHCP	Backyard Habitat Certification Program	ODFW	Oregon Department of Fish & Wildlife
CEL	Conservation Engagement Liaison(s)	OISC	Oregon Invasive Species Council
CIS	Conservation Implementation Strategy	OSU	Oregon State University
CWMA	Cooperative Weed Management Area	OSWB	Oregon State Weed Board (ODA)
CSP	Conservation Stewardship Program	OWEB	Oregon Watershed Enhancement Board
DEI	Diversity, Equity and Inclusion	SI	Sauvie Island
DEQ	Department of Environmental Quality (Oregon)	SD	Strategic Direction
GFPCI	Greater Forest Park Conservation Initiative	SIDIC	Sauvie Island Drainage Improvement Company
LAC	Local Advisory Committee	SWCD	Soil and Water Conservation District
LRBP	Long Range Business Plan	TEK	Traditional Ecological Knowledge
MBE	Minority Business Enterprise	USDA	United States Department of Agriculture
NGO	Non-governmental Organization	US	United States
NAYA	Native American Youth and Family Center	WBE	Women Business Enterprises
NRCS	Natural Resources Conservation Service (USDA)		

APPENDIX B

Partnership Roles and Responsibilities

The District works with agencies and individuals as partners in efforts to achieve our vision. Various memorandums of agreement and/or understanding, working agreements, intergovernmental agreements, and informal arrangements formalize the partnerships. The District believes that our existing partners, which include non-profits, government organizations, private companies, community organizations, landowners and volunteers, and yet-to-be determined partners are crucial to us reaching our goals. Our work will only be successful if we are able to truly partner with communities, engage with respect, authentically listen, and have the commitment to share decision making, control, and resources. We must further examine and prioritize working with partners that share our equity goals to further maximize impacts with underserved communities.

Local Level

Landowners, renters, producers, schools, community organizations, general public

The general public uses the District as its primary point of contact for not only District programs and information, but those of the Oregon Department of Agriculture and the USDA's Natural Resource Conservation Service. Landowners, renters, schools, community organizations, and agricultural and forest products 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.

Culturally-Specific Organizations

The District understands that we must further develop and support relationships with culturally-specific organizations. Culturally specific organizations are led and developed by the communities they serve. Through authentic and respectful

partnerships with culturally specific organizations we are able to make more informed and effective impacts in our equity and conservation efforts at large together with the communities we wish to serve.

Local Government

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

OSU 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.

Other Local Partners

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

Regional Level

The District works with the following regional partners to better coordinate efforts and maximize impacts: Four County Cooperative Weed Management Area (CWMA), Intertwine Alliance, Metro, Northwest Weed Management Partnership, SOLVE, and others.

Advisory Committees

Staff and board members have been involved in various Citizen Advisory and Technical Advisory Committees that are working on issues of importance to citizens in our service area. In addition, staff have continued to engage in Local Advisory Committees (LAC) made up of landowners, agricultural producers, and environmental representatives to develop Agricultural Water Quality Management Area Plans. District staff participate in three local advisory committees: Lower Willamette LAC, North Coast LAC, and Tualatin LAC.

State Level

The Oregon Department of Agriculture (ODA) Natural Resources Division provides administrative oversight and partial administrative and technical support funding. The Oregon Department of Environmental Quality (DEQ), Oregon Department of Fish and Wildlife (ODFW), Oregon Department of State Lands (responsible for navigable waters, submerged and submersible land plus leases for marinas, and moorages), and Oregon Watershed Enhancement Board (OWEB) provide funding. The Oregon Association of Conservation Districts (OACD) provides technical and administrative support to the District and is the main conservation district advocacy organization with the Oregon State administration and legislature. We coordinate with numerous state agencies to carry out our work including Oregon Invasive Species Council (OISC), Oregon Department of Forestry and others.

National Level

The national Natural Resource Conservation Services (NRCS) office provides funding for work agreements with the District.

Tribes, Tribal Government and Inter-Tribal Organizations

As we approach partnerships with Native American tribes, we do so with the understanding that they are sovereign nations and acknowledge indigenous community members as the original inhabitants of the land the District now aims to serve. We understand that partnering with tribes, tribal organizations, and tribal individuals is instrumental to better serving all of our constituents and reaching our conservation and equity goals. 🌱

APPENDIX C

Long Range Business Plan Conservation Scope Information Gathering Report

May 12, 2020

Background

To better inform our Long Range Business Plan (LRBP) Update we reached out to community members, program participants, organizational partners, staff and board to gather a diversity of perspectives to consider in planning for our organization's future scope, financial sustainability and overall health with an aim of embedding equity and inclusion as a founding value in all that we do. We gathered input through:

- 32 partner and community organization interviews
- 160 historically underserved community members were surveyed by 8 hired Community Engagement Liaisons (CELs) comprised of community leaders, translating as needed, within the following communities: Arabic, African American, Chinese, Latinx, Native American, Slavic, and Vietnamese.
- 183 online and in-person surveys
- Staff and Board online surveys and follow-up discussions
- Partner and community meeting discussions

Report Intent: This report provides high-level summary findings key to the conservation scope discussion from these efforts, but more detailed reports on findings are available upon request.

Report Content

Partner Interviews	Page 2
Community Engagement Liaisons (CELs) Surveys	Page 3
Online and In-Person Surveys	Page 4
Staff and Board Surveys	Page 5

Overarching Themes/Findings

- The top threat and barrier to people engaging in voluntary action with the District was found to be lack of awareness of our District and conservation issues in general.
- The need for more conservation education and clarity/simplification of messaging was highlighted throughout.
- Clean water or water quality remains a top concern across all datasets.

- Climate change, air quality, soil health and access to land have surfaced as priority issues to many surveyed in concert with identified opportunities to work on these issues and better meet prioritized historically underserved community members' needs.
- Wildlife habitat and connectivity certainly ranked towards the top for partner interviews and online surveys, but the CELs surveys didn't showcase wildlife as a key concern for community members responding.
- Cultural conflicts with our invasive species management philosophies and/or tools has surfaced in surveys and interviews alongside partner interviews finding invasive programing as critical to that stakeholder group.
- Increasing pressures of development and urbanization along with related concerns for wildlife habitat/connectivity and watershed health have been emphasized in the results.

Interview Findings

The following showcases the most frequently mentioned candid feedback we received in conducting 32 interviews with partners, program participants and other stakeholders to better understand what we do well, where we can improve, and what programs or areas of work we should prioritize over the next five years.

- **What we do well (and multiple partners would like to see continued):**
 - Convening and collaborating
 - Diversity, equity and inclusion
 - Customer support/responsive/technical advice
 - Conservation planning
 - Working with landowners
- **Improvements:**
 - Better outreach and communications around services/offering
 - Increase/expand collaboration
 - Address climate change
 - More or sustained capacity, to do what we already do
- **Conservation issues:**
 - Most Mentioned: Education and outreach,

watershed health and water quality, wildlife needs/ habitat/connectivity

- Frequently Mentioned: Climate change, invasive species
- Next Most Mentioned: Diversity equity and inclusion, wildfire risk reduction and forest health

- **Greatest threats:**

- Lack of education/awareness/information
- Climate change
- Development and urbanization
- Capacity and lack of funding

- **Most valued programs/services:**

- All of them, Youth Education and Support
- EDRR Invasives
- Canopy Weeds, Forest Health, Healthy Streams

- **Top Barriers:**

- Awareness
- Time
- Funding

- **Opportunities:**

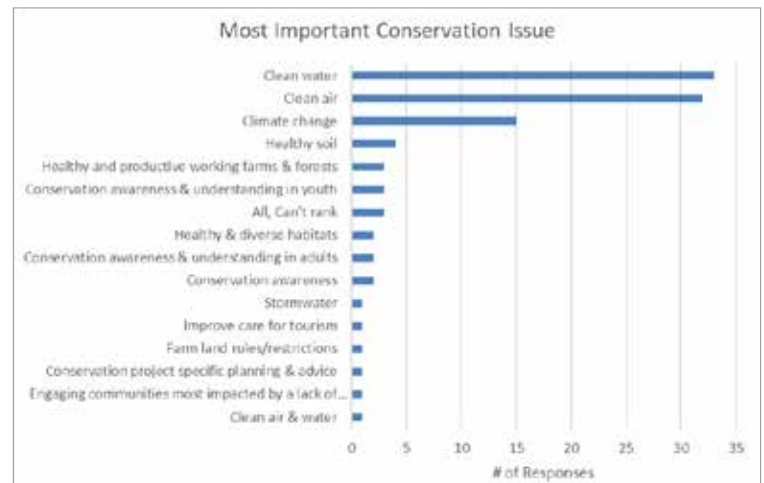
- Outreach and communications
- Collaboration and sharing
- Upcoming events and school events
- Forest resiliency and wildfire risk reduction
- Diversity, equity and inclusion

CELs Findings

Historically underserved community members were surveyed by hired Community Engagement Liaisons (CELs) comprised of community leaders, translating as needed. The majority of those surveyed (93%) have had no interaction with the District prior to this survey despite 23% of those surveyed living within the District's boundaries.

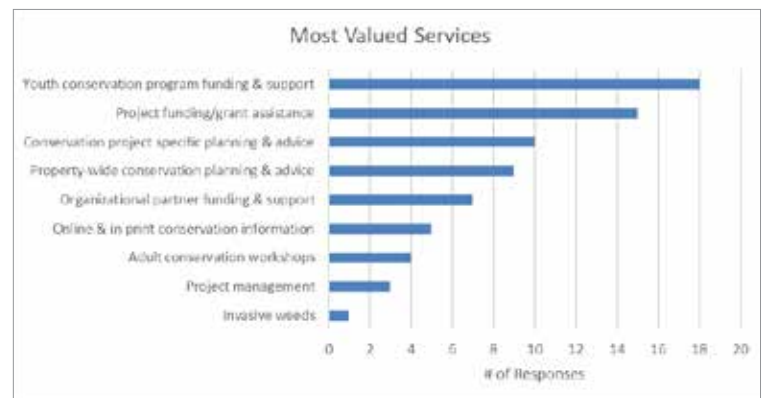
While clean water, clean air, climate change and soil were spotlighted when asked to rank conservation issues, the general ask for conservation issues of importance access to natural areas and garden space surfaced as a third ranking criteria amongst the aforementioned categories. The access issue also came out in CELs reports regarding a desire to culturally connect, enjoy and work with land in a variety of ways including a desire from some to return to farming, foraging, parks access and community garden space.

Our funding and grant assistance rose to the top of general valued services question, but when asked to rank youth programming toppled that.



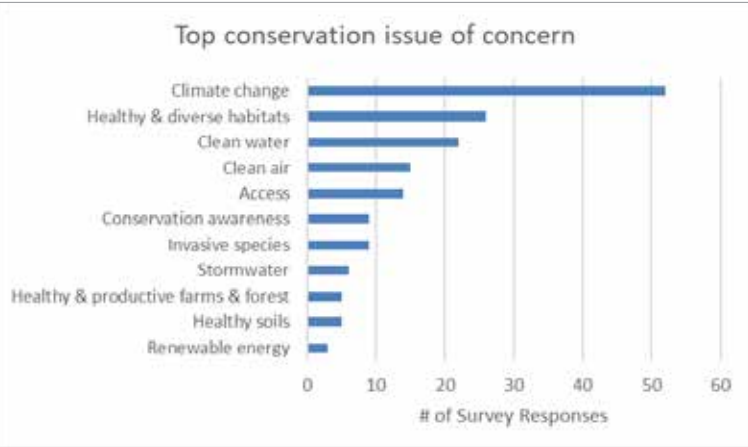
Insufficient information/ understanding of what we do and if our services are available was the top found barrier to them accessing our services with time, landownership, funding and language barriers also noted at relatively high levels.

Opportunities to support cultural connection to land and its management were discussed. Cultural conflicts with our invasive species management philosophy and tools was highlighted. Providing programming at predetermined community spaces (even if out of jurisdiction) was strongly encouraged.

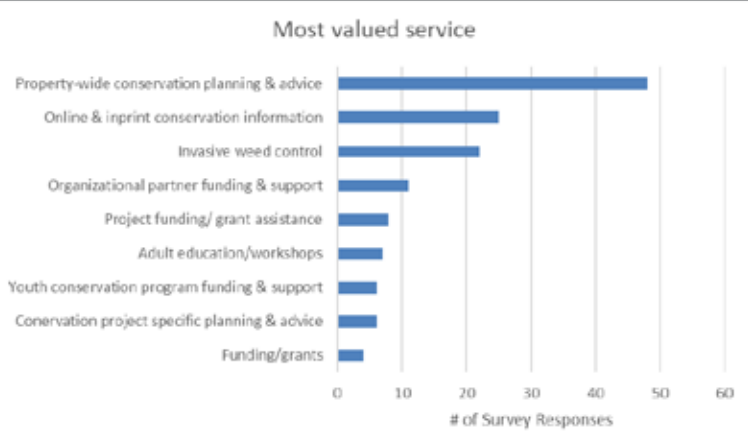


Online and In-Person Surveys

The majority of those surveyed (89%) live within our District boundaries and 92% have heard of us before while 42% have received direct assistance from the District and 25% declared themselves to be a project/program partner.



Although clean water and invasive species topped the general conservation issues of concern question, when respondents had to rank issues, climate change and healthy habitats rose to the top. Soils also took a marked drop in overall % when respondents were asked to rank. In addition to those listed, diversity, equity and inclusion (DEI), anthropogenic historical ecology, politics, preservation and urbanization, naturescaping in suburbs, moving tank farms, preservation of trees and urban forests, salmon populations, wildfire, and oak preservation were found written in answers.



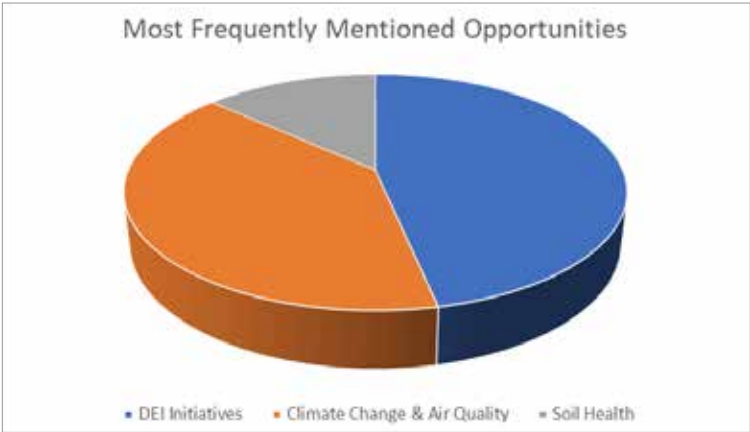
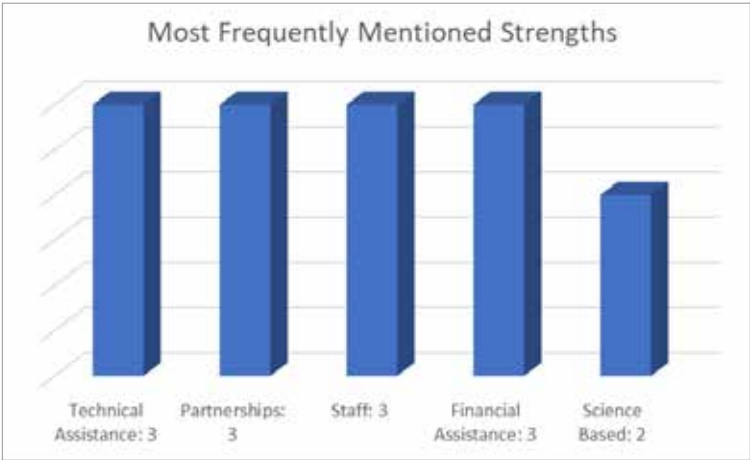
For general valued service responses, the top picks were the same, but invasive weed control topped the list with online and in-print in 2nd place and property-wide conservation planning in 3rd. Write-in responses for most valued services included community gardens, hedgerows, conservation, and raising awareness about conservation threats.

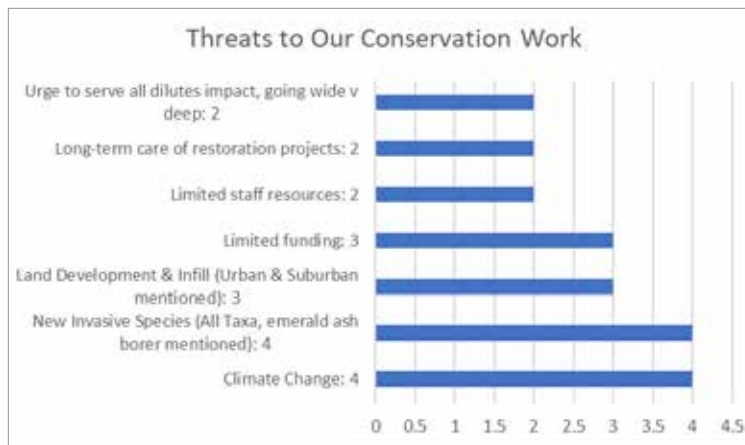
The responses to the barriers question (below) matches the top identified barriers from the CELs, but shows time and funding to be more significant barriers than were listed for the CELs. “Other” barriers written in include uncertainty, funding needs, confidence and need.

I don't know what you do	25.40%	32
I don't have enough time in my schedule	25.40%	32
I don't have extra funds to contribute to a project	22.22%	28
I'm not physically able to implement suggestions	8.73%	11
I don't own property, or it's too small to qualify for your assistance	13.49%	17
I don't have sufficient information on what services I might be eligible for	35.71%	45
I'm not comfortable working with government organizations	3.17%	4
Your information isn't available in my preferred language	1.59%	2
Other (please specify)	27.78%	35

Staff and Board Surveys

The following showcases graphic depiction of key staff survey results:





In addition to the staff survey results, depicted above, we collected answers on these same questions from our Board.

We received 4 Board responses to this survey and are in close alignment with the staff findings. For our strengths, the Board responses highlighted our staff and partners as our top strengths. The Board highlighted our invasive species work, restoration and education work as most valuable. Increased and leveraged funding were most frequently listed as Board identified opportunities, however other particulars were mentioned including easements, diversity, equity and inclusion (DEI) and becoming less siloed across urban/rural issues.

Lastly, for threats, two board members identified limited resources (funding and staff) as the biggest threat while the remaining respondents cited climate change and lack of landowner follow-through. Staff's flagging of climate change and development/urbanization as key threats to our conservation work is in close alignment with what we've heard from others. 🌱

APPENDIX D Evolving Success Criteria

The following criteria was used by staff and board to inform the creation of this plan.

Preamble on Evolving Success Criteria for Effective and Informed Decision Making

Why do we need evolving (continuously developed and adaptive) success criteria?

- To define outcomes
- To facilitate decision making
- To ensure diversity, equity and inclusion is embedded as a foundational value

How will we use these criteria?

- To examine and weigh the impact of difficult decision alternatives
- To provide guidance when a conversation or decision is stuck and it's unclear what might be the best path forward

Focal areas and foundational values defined:

To ensure we are all grounded in how we define the three outcome focal areas and foundational values of diversity, equity, and inclusion, definitions are provided below:

Conservation Scope: Our organizational mission, vision, and goals that determine what we do, why we do it and how we do it. This will be affirmed or modified as we move through the

process. Conservation Scope also includes identifying specific initiatives and program areas that achieve our mission, vision, and goals as determined through the LRBP update process.

Financial Sustainability: An organizational framework that ensures the long-term ability to successfully fulfill our mission while being a good steward of public funds through:

- a. Readily available financial resources to implement annual work plans
- b. Sufficient reserves to ensure resiliency during economic downturns and the capacity to support capital projects while maintaining our current staffing level

Organizational Health: An organization's ability to function effectively and efficiently, to cope adequately, to change appropriately, and to grow from within.¹

Diversity, Equity and Inclusion: *Diversity* encompasses a wide range of qualities and attributes within a person, group, or community. When we celebrate diversity, communities and workplaces become richer, drawing upon the variety of experiences, perspectives, and skills that people can contribute.²

Equity is the concept of treating everyone fairly by acknowledging everyone's unique situation and addressing systemic barriers. The aim of equity is to ensure that everyone has access to equal results and benefits.²

Inclusion: Acknowledging and valuing people's differences so as to enrich or shift social planning, decision making, and

quality of life for everyone. In an inclusive society, we all have a sense of belonging, acceptance, and recognition as valued and contributing members of society.²

Conservation Scope Evolving Success Criteria

Given your examination of the following, how does this decision align with what we aim to accomplish as an organization:

1. Aligns with our affirmed or modified mission
2. Aligns with our affirmed or modified vision
3. Aligns with our affirmed or modified goals
4. Results in long-term impactful conservation outcomes
5. Embeds equity and inclusion as foundational value in all that we are (our organizational makeup) and all that we do (our work)
6. Is responsive to community needs of communities in the District that we have prioritized

7. Allows us to fulfill a unique niche or unmet need with strategic partnerships leveraging our limited resources and expanding our overall reach
8. Effectively addresses identified priority ecosystem or conservation threats

Underlined terms will be further evaluated and refined as we move through the process:

- #4: What “long-term impactful conservation outcomes” will we prioritize?
- #6: What communities shall we prioritize?
- #7: What makes partnerships “strategic” in addition to leveraging resources and expanding reach?
- #8: *What conservation threats do we wish to address? (*Critical question for the Board)* 🌱

1. Organizational Health Diagnostic & Development Corporation (Source: <https://www.organizationalhealth.com/publications/OHFinal.pdf> , 3/9/2020)
2. Nonprofit Association of Oregon, Equity & Inclusion Lens Guide, 2019. (Source: <https://nonprofitoregon.org/equity-inclusion-lens-guide-message> <https://nonprofitoregon.org/sites/default/files/NAO-Equity-Lens-Guide-2019.pdf> , 7/10/2020)

APPENDIX E Conservation Threats

The following prioritized list of conservation threats staff would like the District to address was crafted after examining information gathering reports.

Conservation Threats We Continue to Prioritize

Overarching/impacting many conservation issues

- Climate change (hits many other threats)
- Development, infill and urbanization (hits many other threats)
- Degraded working farms and forestlands
- Declining watershed health and functionality (hits many other threats)
- Addressing new invasive species (EDRR)
- Inadequate stormwater management (hits many other threats)
- Wildfire risks

Education/messaging/outreach/information access (*most mentioned barrier and threat)

- Lack of adult education and engagement (conservation issues and what individuals can do about them)
- Lack of youth education and engagement (conservation issues and what individuals can do about them)
- Lack of trust in government and science

Social sustainability/social component of conservation

- Access (to farmable land, to community gardens, to harvest/forage and for enjoyment of local natural areas/features)
- Lack of diversity in the environmental field and our District’s staff and leadership (DEI)
- Long-term management and follow-through

Water quality

- Declining water quality

Wildlife habitat

- Continued and expanding wildlife habitat degradation and loss of connectivity
- Rare and declining habitats and dependent species

Soil health

- Economic viability of working farms and forestlands
- Declining soil health

Conservation Threats We Will Increase in Priority

1. Lack of conservation education (the need to broaden our reach with an emphasis on connecting with communities that our District hasn't served/reached and expanding general awareness of conservation issues)
2. Climate change (the need to more clearly communicate how we already address this issue, and how we will continue to do so in our updated plan, but also a desire to work more proactively on addressing this threat)
3. The following historical conservation focal areas:
 - a. Water quality
 - d. Soil health
 - e. Habitats (Emphasis on rare and declining habitats and connectivity for plants, wildlife, and people)
4. Threats related to relevancy, equity, access, and disparities (focus on geography and communities) must be addressed by better understanding historically underserved communities and then responding to what we learn.
5. Development and urbanization (we have an interest in finding creative ways to "get in front" of and mitigate related threats)
6. Lack of incentives to motivate conservation action and decreasing partner capacities

New Conservation Threats We Will Prioritize

1. Disparities in the demographics of the communities we have largely/historically served
2. Disparities in environmental justice outcomes
3. Decreasing lands to work and people to work the land (i.e. farms/forests and farmers/foresters/ranchers to work the lands)
4. Lack of cultural connection with the land and no clear pathway to regain connection

Conservation Threats to Lower in Priority

1. Lack of funding (Recognition of the possible need to limit funding projects directly with our tax base if we add new focus areas and/or do not add additional, secure funding sources. This does not include or affect partner funding as a strategy for expanding our reach.)
2. Controlling common invasive species as a stand-alone action (We will continue to do this as part of our more comprehensive restoration projects where we'll be replacing with diverse native habitat.)
3. Lack of research – supporting information
4. Access to local natural areas/features

Conservation Threats for Future Consideration

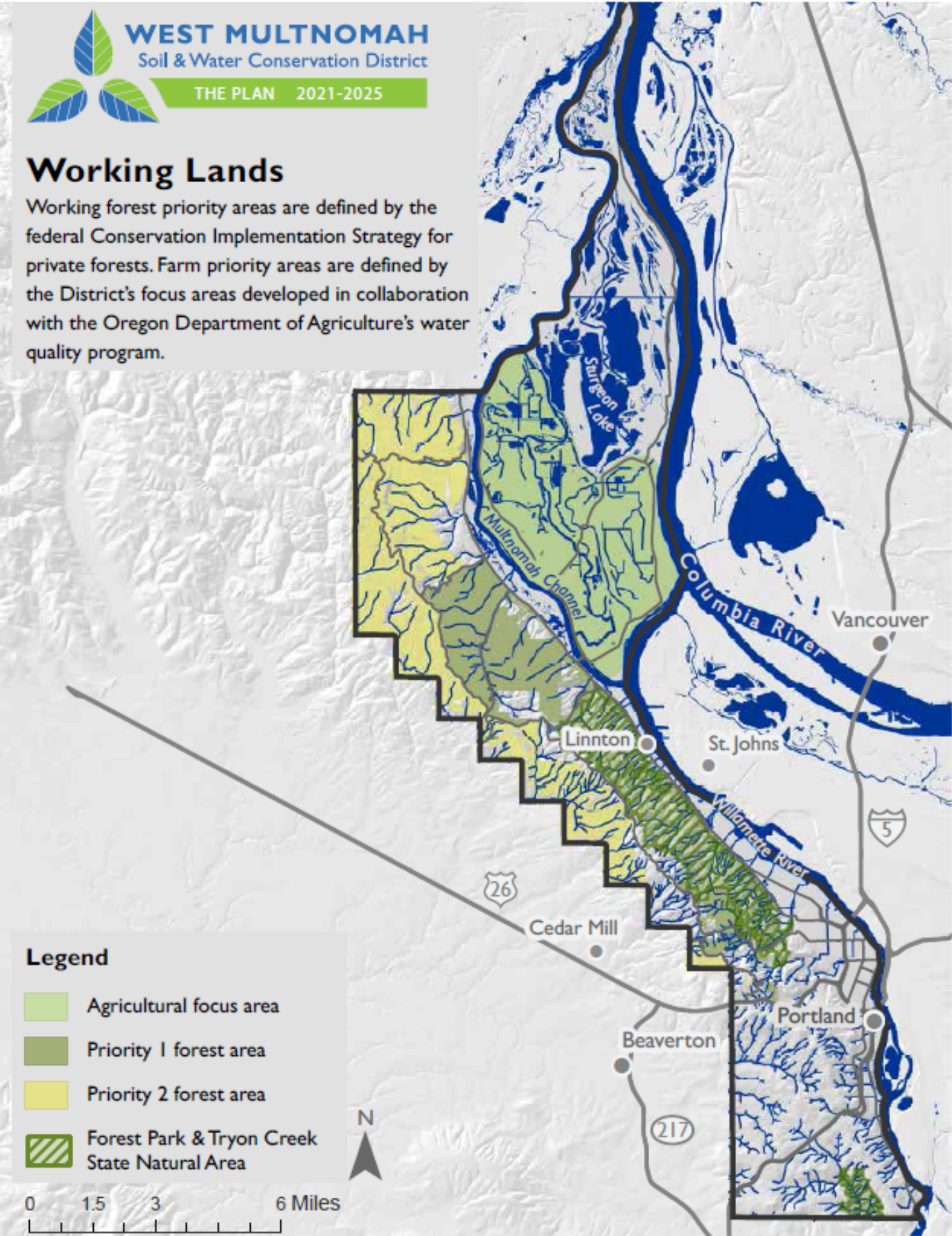
**Might still consider support and/or partnership to help address some of these threats.*

1. Declining air quality
2. Toxins exposure and legacy (Linton tank farms, railroads/coal, and contaminated garden soil concerns)
3. Food insecurity
4. Declining water quantity
5. Increasing need for more transportation options/capacity (hits many other impacts)
6. Herbicide issues / public mistrust of herbicides

Other Feedback Captured to Be Addressed in How We Roll Out the Plan and/or For Inclusion in Other Parts of the Plan

- Lack of awareness of WMSWCD (We are not widely known and strive to increase awareness of our services.)
- Communications that are overly complex (We strive to use clearer, simpler, less technical language for all public-facing products.)
- Lack of funding and capacity (for inclusion in Organizational Health section/discussions) 🌱

APPENDIX F: Geographic Focus Areas













WEST MULTNOMAH
Soil & Water Conservation District

THE PLAN 2021-2025

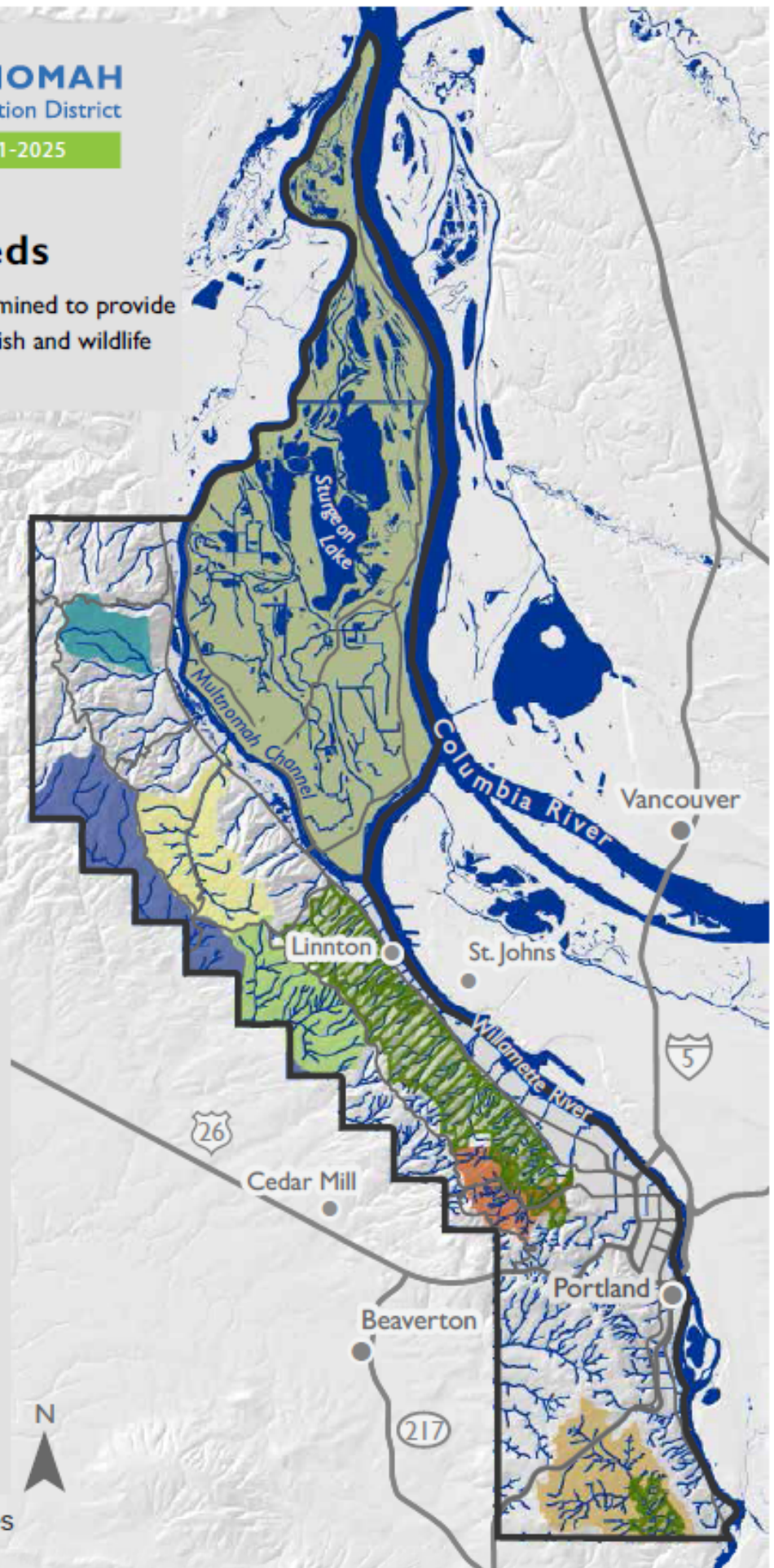
Priority Watersheds

These watersheds have been determined to provide significant value to a wide array of fish and wildlife species.

Watersheds

-  Sauvie Island
-  Crabapple Creek
-  McCarthy Creek
-  Rock Creek
-  Abbey Creek
-  Balch Creek
-  Tryon Creek
-  Forest Park & Tryon Creek State Natural Area

0 1.5 3 6 Miles










Priority Landscapes

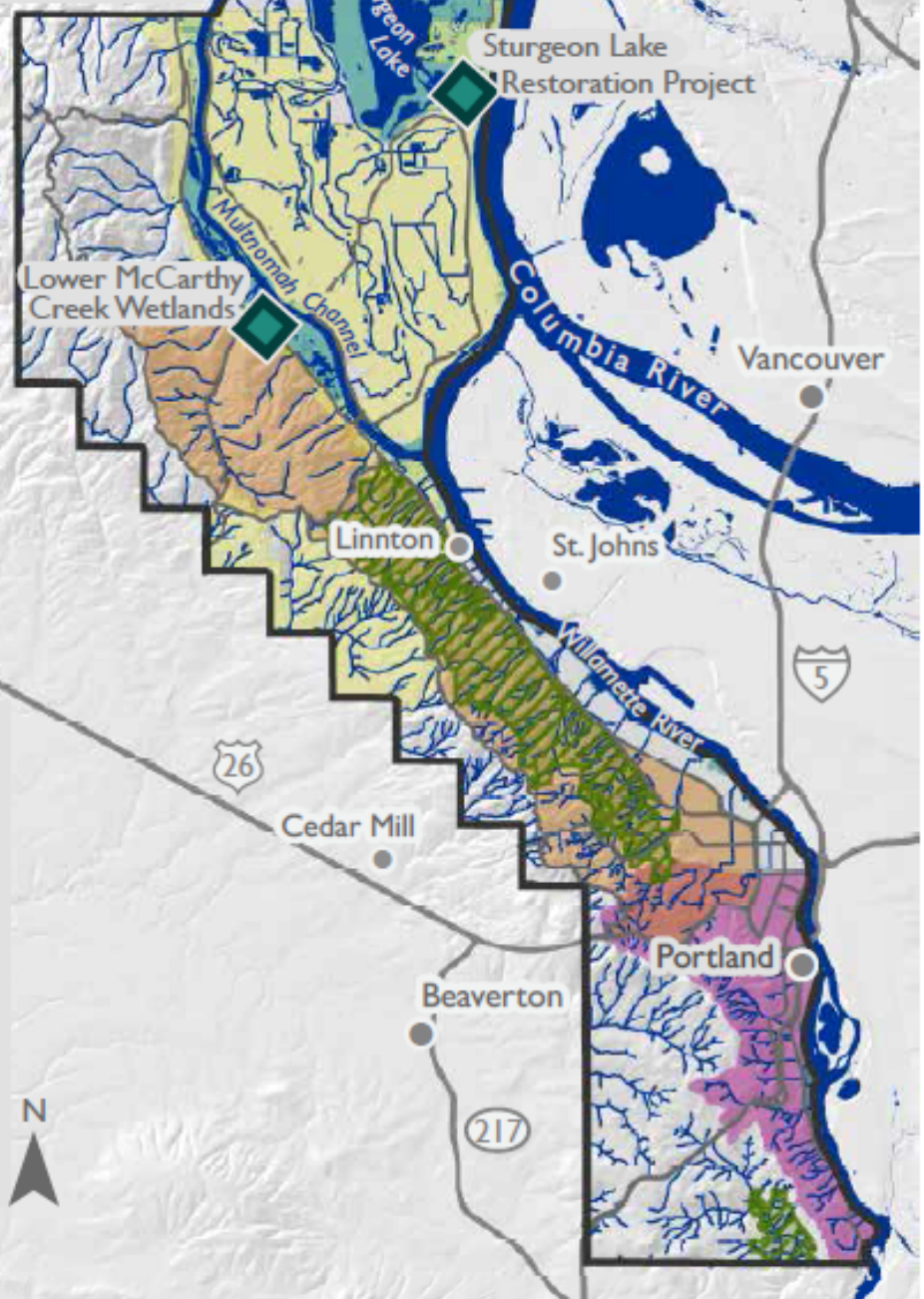
Priority habitat areas include the unique ecosystem of the Columbia River estuarine area and the federal Conservation Implementation Strategy area for Oregon white oak conservation. The greater Forest Park ecosystem and the westside wildlife corridor represent collaborative regional efforts for upland forest habitat connectivity.

Landscapes and Habitat Areas

-  Lower Columbia River estuarine area
-  Oak habitat priority area
-  Greater Forest Park ecosystem
-  Westside wildlife corridor
-  Forest Park & Tryon Creek State Natural Area



0 1.5 3 6 Miles







WEST MULTNOMAH
Soil & Water Conservation District

THE PLAN 2021-2025

Education Focus Areas

Preliminary focus areas are public elementary school districts with the 1) highest % of students enrolled in free or reduced school lunch programs, % non-white students, or % Black students and one other high % in the above-mentioned categories as well as % Latino population, or 2) high %s in 3 of these 4 areas.

Prioritized Elementary School Zones (preliminary)

-  Zones: Capitol Hill, Chapman, Hayhurst, Markham, Rieke
-  Forest Park & Tryon Creek State Natural Area



0 1.5 3 6 Miles

