



## EMSWCD 1<sup>st</sup> Quarter Progress Report for FY 2017-18

This report describes progress made on the EMSWCD FY2017-18 Annual Work Plan and budget through the first quarter of the financial year (July through September 2017).

For this report, substantive progress is measured and described against the activities identified in the “annual project activities and deliverables” tables given in the FY2017-18 Annual Work Plan appendices. For reporting purposes, each of the identified activities was given a status indicator, as of the end of the third quarter, as follows:

- **Completed;**
- **In progress;**
- **Planned for the reporting period, but no progress made during the reporting period** because it has not been started or progress was made previously but no additional progress was made during the current reporting period; or
- **Not planned for the reporting period and no progress made during the reporting period.**

A summary of the status of the activities for each of EMSWCD’s programmatic areas at the end of the first quarter is given in the table and chart below. The details regarding progress are given for each of EMSWCD’s programs in the tables on the subsequent pages.

In total:

- **142 activities were planned to be undertaken** within the first quarter of the fiscal year.
- Of these, **138 (97%) have either been completed or are in progress** as planned.
- **4 (3%) have not been undertaken** as planned.

Significant accomplishments this quarter include:

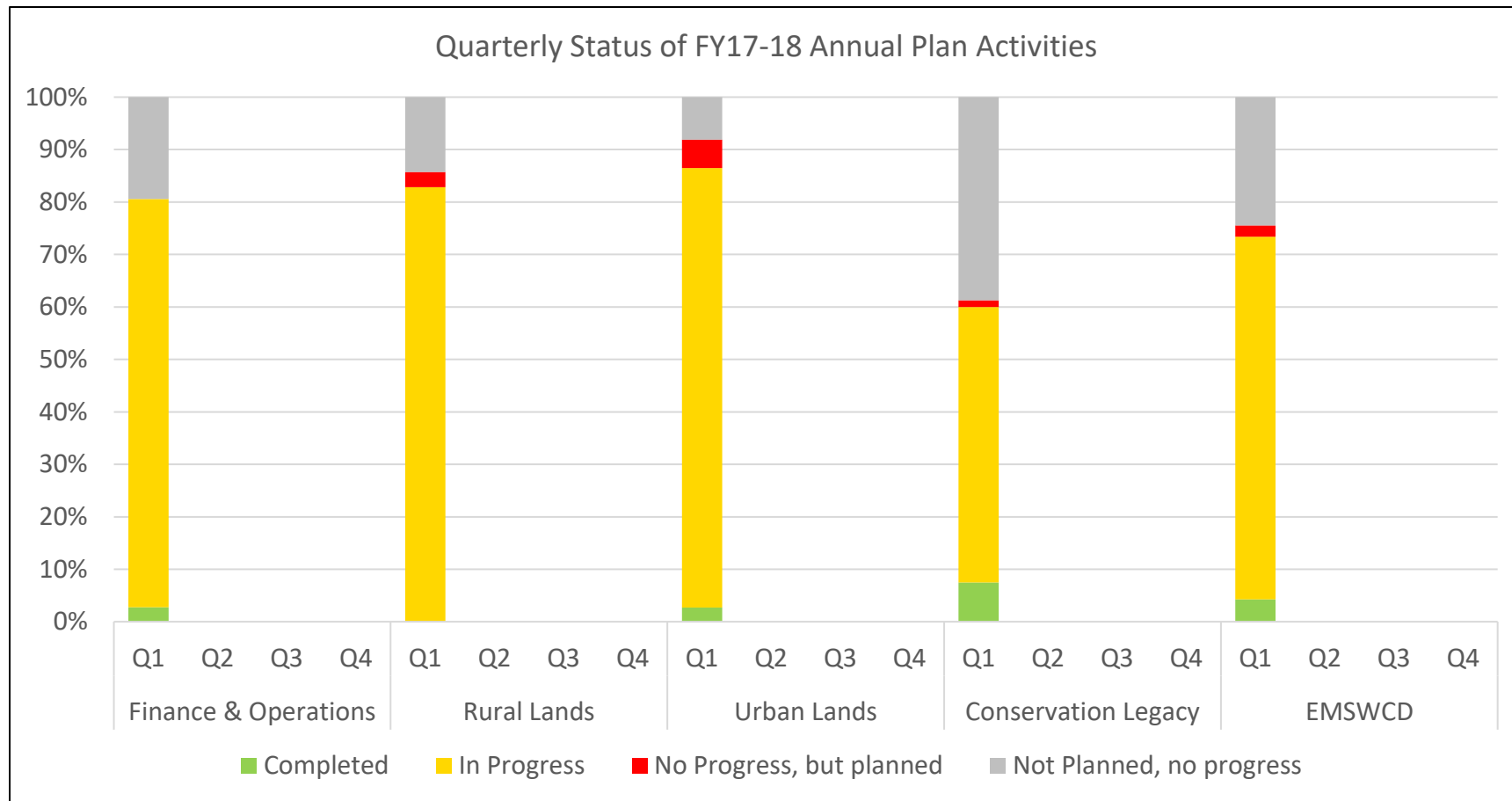
- **Equity initiative** launched with CEI. Three-day equity training for staff, and 1-day training for board completed.
- **Annual meeting** held at Multnomah Grange.
- Two **new associate directors** were appointed and onboarding completed.
- A listening session was held by Rural Lands staff to get input on **Erosion Solutions** from nurseries.
- The **cleanup and demolition of the residence** on the recently acquired parcel adjacent to the Headwaters Farm was completed.

Significant activities not accomplished the quarter include:

- Some **weed control** work was limited because of the Eagle Creek fire.
- Two major **stormwater projects** at Headwaters were delayed and are on hold until weather conditions are more suitable again in Spring.



FY17-18 Q1 SUMMARY					
Program Area	No. of Activities	Completed	In Progress	No Progress, but Planned	Not planned during period, no progress
Finance & Operations	36	1	28	0	7
Rural Lands	35	0	29	1	5
Urban Lands	37	1	31	2	3
Conservation Legacy	80	6	42	1	31
<b>EMSWCD Total</b>	<b>188</b>	<b>9 (5%)</b>	<b>129 (69%)</b>	<b>4 (2%)</b>	<b>46 (24%)</b>





Expenditures for FY17-18 to date are shown in the table directly below. After the first quarter, a total of 20.5% of the operational budget has been expended. Finance & Operations (23.4%), Conservation Legacy (25.5%) and Headwaters Farm (24.6%) are the closest in terms of percent spending relative to the percent of the fiscal year elapsed (75%). These are followed by Rural Lands (19.3%), and Urban Lands (14.0%) which rely more on partners and other external entities for their work, and also have a greater proportion of external contracting as part of their expenditures not spread evenly through the year. There were not staff vacancies during the first quarter affecting expenditures.

Category		Purpose	FY 2017-18		
			Total Annual Budget	Actual through Q1	% of Budget Expended
Operations	Finance & Operations	Staffing, facilities, and operations	\$740,890	\$173,162	23.4%
	Rural Lands	Staffing, contracting, and operations	\$1,087,457	\$210,277	19.3%
	Urban Lands	Staffing, contracting and operations	\$717,922	\$100,684	14.0%
	Conservation Legacy	Staffing and operations	\$464,175	\$118,311	25.5%
	• Headwaters Farm	Farm-specific staff and operations	\$365,948	\$89,887	24.6%
	<b>Sub-total Operations</b>		<b>\$3,376,392</b>	<b>\$692,321</b>	<b>20.5%</b>
Capital, Grants, & Contingency/Unappropriated	Land Conservation Fund	Acquisitions	\$7,683,426	\$5,000	0.1%
	Grants	External grants	\$1,960,570	\$324,472	16.5%
	Partner Grants Mgt.	Pass through funds	\$25,000	\$0	0%
	Contingency Funds	Unanticipated costs	\$298,218	\$0	0%
	Unappropriated Funds	Funds held in reserve	\$850,000	\$0	0%
	<b>Sub-total Grants, Funds and Reserves</b>		<b>\$10,817,214</b>	<b>\$329,472</b>	<b>3.0%</b>
<b>Total EMSWCD Budget</b>			<b>\$14,193,606</b>	<b>\$1,021,793</b>	<b>7.2%</b>

Progress made against the activities identified in the “annual project activities and deliverables” tables given in the FY2017-18 Annual Work Plan appendices, follows below.



## Detailed Indicators<sup>1</sup>

FINANCE & OPERATIONS Annual Project Activities and Deliverables		Timeframe				1 <sup>st</sup> QUARTER COMMENTS
		Q1	Q2	Q3	Q4	
<b>Budget &amp; Finance</b>	Complete FY16-17 budget audit.	In progress	X			The audit fieldwork and bulk of audit prep-work is complete. Draft report is expected by the end of October.
	Track FY17-18 budget.	In progress	X	X	X	Proceeding as expected with no issues to report.
	Develop FY18-19 budget.	Not planned		X	X	Starts in early 2018.
	Review Fiscal Policies and recommend changes as needed.	Not planned			X	Planned for 4 <sup>th</sup> quarter.
	Review Contracting Policies and recommend changes as needed.	In progress				Still in progress but not complete. Jed's resignation/getting Lindsay oriented and strategic planning have taken priority.
	Complete an expense and revenue analysis of EMSWCD operations since inception of permanent property tax levy and report out on accomplishments.	In progress	X			Historical data has been input and analysis has begun. Proceeding as planned.
	Review and monitor EMSWCD contractual agreements.	In progress	X	X	X	Proceeding as expected with no issues to report.
<b>Office Management &amp; Human Resources</b>	General office support (e.g. reception, filing, travel arrangements, supply orders, meeting coordination, correspondence, workshop registration, events).	In progress	X	X	X	Proceeding as expected with no issues to report.
	Information technology support to ensure properly functioning equipment and timely troubleshooting of technology problems.	In progress	X	X	X	Proceeding as planned. A new IT support contractor has been identified and we plan on engaging them in January of 2018.
	Retain historical information per the state retention schedule, and maintain an organizational record keeping and archival system.	In progress	X	X	X	Proceeding as expected with no issues to report.
	Work with UL/RL/CL staff to reorganize basement for efficiency and usability.	Not planned	X	X		Planned for 2 <sup>nd</sup> and 3 <sup>rd</sup> quarters.
	Work with Equity Team to identify and implement trainings, refine purpose and goals, and continue to move forward with incorporating equity, diversity and inclusion into organizational policy and program work.	In progress	X	X	X	Proceeding as planned. Staff/board training was held in August. Follow-up meetings with CEI have begun. Staff and board are discussing equity "homework" readings.

<sup>1</sup> An "X" in the activity tables denotes that the activity is planned to be undertaken or worked on in that quarter.



	Collaborate with outreach and education staff to assess and evaluate the potential for expanded use of volunteers in EMSWCD’s activities.	No progress	X			This project has been put on indefinite hold as there does not appear to be a significant need for expanded use of volunteers.
	Research and recommend possible additional “employee well-being” benefits (e.g. HSAs, DCAPs, commute incentives).	Not planned	X		X	
	Review health and other insurance benefits to determine if changes or enhancements are needed for upcoming fiscal year.	Not planned			X	
	Review and update Employee Handbook in conjunction with Personnel Policies.	In progress	X			Updating Policy Notebook as policies are created and approved.
	Plan logistics for and coordinate strategic planning retreat.	In progress	X			Proceeding as planned. The venue has been secured and planning is underway for the Nov 6-8 retreat dates.
	Onboarding of 3-5 new associate directors.	In progress	X			2 new associate directors have been appointed and onboarded.
	Compile and provide an overview of EMSWCD’s HR policies and benefits in comparison to other agencies.	Complete				An initial evaluation was completed for policy adoption purposes. A further analysis is likely to be completed for round 2 of the policies.
	Research the feasibility of and options for replacing our aging phone system.	In progress	X	X		Still in progress but not complete. Lindsay has reached out to several companies to gather prices and services to compile a comparison chart.
	Prepare for, coordinate and host 12 board meetings and 16 committee meetings.	In progress	X	X	X	Progressing as planned, no issues to report.
<b>Facilities</b>	General maintenance of buildings, equipment and facilities at Headwaters Farm.	In progress	X	X	X	Progressing as planned, no issues to report.
	General maintenance of buildings and facilities at Oxbow Farm, and other properties acquired through the Land Legacy Program.	In progress	X	X	X	Progressing as planned, no issues to report.
	General maintenance of building, state vehicles and facilities at Williams Headquarters.	In progress	X	X	X	Progressing as planned, no issues to report.
	Undertake a comprehensive assessment of the Williams Avenue grounds and building space use, and develop a long-term plan for implementing modifications and upgrades.	In progress	X			In progress. Currently compiling a list of modifications & upgrades, gathering information and researching costs.



<b>Marketing &amp; Media</b>	Restructure the five-year Marketing Plan to reflect current strategic planning efforts and adding appendices for each program area.	In progress	X			In progress. Restructuring Marketing Plan and incorporating latest survey data in preparation for strategic planning.
	Refine the Branding/Style/Identity Guide companion to the Marketing Plan to ensure consistency in messaging and outreach materials	In progress				In progress. Developed an updated version of the guide, sent to management for review, and began further revisions.
	Analyze data collected from FY16-17 marketing survey to inform future marketing and outreach efforts.	In progress				In progress. Compiled data from survey, 2015 survey and other sources, and analyzed high-level data for a board briefing.
	Implement revised Marketing Plan, monitor progress and make course changes as needed.	Not planned	X	X	X	No progress, not planned. Marketing Plan will be implemented once it is approved.
	Develop, revise, maintain and add content to the website to reflect ongoing EMSWCD updates, events and priorities.	In progress	X	X	X	In progress. Continually updated parts of the website including the About section, Headwaters Farm, Grants, Upcoming Events. Edited and posted front page posts. Added new imagery and galleries. Archived old content.
	Develop and integrate social media to drive traffic to website, encourage event participation and promote conservation practices.	In progress	X	X	X	In progress. Continuing to use and expand social media. Created new Instagram account and have used it to cross-promote Facebook ads.
	Perform web and social media analytics to determine efficacy of marketing efforts and action-driven web content.	In progress	X	X	X	In progress. Have performed small- and large-scale analytics on workshops, campaigns (such as Headwaters), and long-term analytics for marketing planning.
	Assist with outreach, press releases and media contacts.	In progress	X	X	X	In progress. Worked with Conservation Legacy staff to draft and finalize two press releases, send to press. Worked with Finance & Operations staff to send regular board and committee notices. Assisted program staff with event outreach.
	Identify advertising opportunities, develop advertisement content and coordinate publication.	In progress	X	X	X	In progress. Discussed several print and digital advertising opportunities with program staff. In the 1 <sup>st</sup> quarter, there have only been social media ads.
	Coordinate printing for all mailing and outreach materials.	In progress	X	X	X	In progress. Have worked with each of the programs to develop print materials and/or send them to print/mail.
	Refine display and material templates as needed by programs.	In progress	X	X	X	In progress. Developed a tri-fold brochure template and used it to create a Grants brochure.



RURAL LANDS Annual Project Activities and Deliverables		Timeframe				1 <sup>st</sup> QUARTER COMMENTS
		Q1	Q2	Q3	Q4	
Rural Water Quality	Complete the five-year program plan.	In progress	X	X		Work in 1 <sup>st</sup> quarter focused on preparation for strategic planning. The 5-year plan will continue after strategic planning.
	Develop an outreach strategy and calendar for each program area.	In progress	X			Completed for ODA focus area and Erosion Solutions.
	Use mailings, advertisements, displays, presentations, workshops, demonstrations, social media, and tours to reach rural landowners concerning water quality and soil conservation.	In progress	X	X	X	Tabled at Small Farm School. Promoted listening session and field demo for Erosion Solutions in 2 <sup>nd</sup> quarter.
	Prioritize outreach in our ODA Ag water quality focus area (Beaver Creek HUC).	In progress	X	X	X	Planning for a horse and livestock workshop in 2 <sup>nd</sup> quarter.
	Partner with other SWCDs to fund, develop and staff booths at the NW Ag Show and the Far West Show.	In progress	X		X	Far West Show booth completed. Topic was beneficial insects; developed an easy to use guide with Clackamas SWCD. Also gave two presentations at the show on erosion and irrigation.
	Collect and analyze monthly samples in upper Beaver and Johnson Creeks.	In progress	X	X	X	Completed monthly sampling.
	Install continuous temperature loggers in upper Beaver Creek, upper Johnson Creek, Big Creek and Smith Creek.	In progress			X	Temperature loggers for the 2017 summer monitoring were removed in the 1 <sup>st</sup> quarter.
	Conduct 20 site visits including first-time site visits with 5 landowners.	In progress	X	X	X	8 site visits; 2 first-time.
	Develop 5 technical recommendations and/or conservation plans that include recommendations to address erosion and/or water quality.	In progress	X	X	X	Two practice recommendations developed.
	Assist 4 landowners with cost share applications.	In progress	X	X	X	Two cost share applications are in progress.
	Partner with NRCS to promote and deliver cost share assistance.	In progress	X	X	X	Since our District Conservationist position is still vacant, this work has been limited.
	Identify specific ways to overcome the barriers to addressing erosion.	In progress	X			More outreach and relationship building with OAN, local OAN chapter, and individual nurseries.
Identify and implement erosion prevention demonstration projects.	In progress	X	X	X	Planning for a field demonstration of the installation of erosion prevention products.	



StreamCare	The existing, planted StreamCare areas on 465 acres along 16 miles of stream will be maintained to ensure good rates of plant survival.	In progress	X	X	X	104 StreamCare acres maintained in the 1 <sup>st</sup> quarter. Also maintained 14.7 acres of habitat on Land Legacy properties.
	Another 7 acres prepared and planted in 2017-18.	In progress	X	X		4.7 new acres prepared for planting.
	Coordinate contracted labor crews to prepare new sites for planting, control weeds on existing sites, and plant native trees and shrubs.	In progress	X	X	X	Labor crew availability limited progress in 1 <sup>st</sup> quarter.
	Maintain GPS and GIS data; track and compile deliverables.	In progress	X	X	X	Ongoing. Progressing as planned.
	Manage wholesale plant orders, delivery, and storage.	In progress	X	X		Placed plant orders in 1 <sup>st</sup> quarter.
	StreamCare sites that reach the five-year mark will be evaluated to determine if the site is ready to graduate or if the landowner agreement should be extended. Offer site visits to those graduating.	In progress				28 landowners that will 'graduate' from StreamCare next summer were sent a survey and 12 completed it. Site visits will happen in 4 <sup>th</sup> quarter.
	Offer assistance with enrolling in the ODFW Riparian Program for sites that graduate from StreamCare.	No progress	X	X	X	Will check in with ODFW staff during 2 <sup>nd</sup> quarter.
	Develop options for offering easements on graduated StreamCare sites.	In progress	X	X	X	Options have been identified and discussed with Land Legacy staff. This will explore this at strategic planning.
Weed Control	Complete five-year program plan	In progress	X	X		Work in 1 <sup>st</sup> quarter focused on preparation for strategic planning. The 5-year plan will continue after strategic planning.
	Confirm reports of species on the EDRR weed list, obtain landowner permission, and provide rapid treatment to locations outside of the City of Portland.	In progress	X	X	X	No reports of EDRR weeds during 1 <sup>st</sup> quarter.
	Provide technical assistance with weed identification and control methods.	In progress	X	X	X	Responded to calls and emails 1 <sup>st</sup> quarter.
	Participate in both the 4-county and Columbia Gorge Cooperative Weed Management Areas.	In progress	X	X	X	Ongoing
	Re-visit knotweed sites and continue to treat any new growth.	In progress				~1 acre of knotweed infestation treated on private property in 1 <sup>st</sup> quarter.
	Continue to survey for additional knotweed; obtain permission and treat sites.	In progress				No additional knotweed infestations found.
	Continue to annually treat all known satellite populations of garlic mustard to prevent seed set.	In progress		X	X	Fall treatment of garlic mustard on 3 acres completed.
	Continue to survey for and treat new satellite populations of garlic mustard.	Not planned		X	X	Planned for 3 <sup>rd</sup> & 4 <sup>th</sup> quarter





Coordinate with partners to ensure that garlic mustard control is happening regionally.	Not planned		X	X	Planned for 3 <sup>rd</sup> & 4 <sup>th</sup> quarter.
Provide a free dumpster in Corbett for landowners to dispose of pulled garlic mustard plants.	Not planned		X	X	Planned for 3 <sup>rd</sup> & 4 <sup>th</sup> quarter.
Continue to survey for additional infestations of false brome, English ivy, Old man’s beard, and spurge laurel as well as all EDRR species and species of concern.	In progress	X	X	X	Surveyed 4 acres of private and 10 of public land for false brome; none found.
Treat all known false brome and spurge laurel populations in target areas where landowner agrees. Continue working to reduce English ivy and Old man’s beard in the target areas.	In progress	X	X	X	The majority of planned false brome control could not happen due to the Eagle Creek fire. Controlled 75 sq ft across 1.5 acres. Controlled 2 acres of Clematis across 9 acres. Controlled 0.35 acres of ivy across 4 acres.
Re-vegetate weed control sites as needed.	Not planned		X		Planned for 3 <sup>rd</sup> quarter.
Analysis to determine if the reduce coverage goals for false brome, English ivy, Old man’s beard and spurge laurel were met and to set new goals.	Not planned	X			Planned for 2 <sup>nd</sup> quarter.



URBAN LANDS Annual Project Activities and Deliverables		Timeframe				1 <sup>st</sup> QUARTER COMMENTS
		Q1	Q2	Q3	Q4	
Urban Program	Complete the five-year program plan.	In Progress	X	X		Draft awaiting strategic planning input. Will be and finalized in the 2 <sup>nd</sup> and 3 <sup>rd</sup> quarters.
	Pilot Project: Engage one education and outreach intern for Urban Lands workshop coordination	In Progress	X	X	X	Intern is in place.
	Define program monitoring and evaluation metrics.	In Progress	X	X		Meeting with partners to determine regional efforts.
	Complete research of affordable housing developments and how we might engage them with new CLIP opportunities.	In progress	X			1 <sup>st</sup> quarter: Several internal meetings re: revising urban CLIP and applying equity lens.
	Develop 3 new printed outreach pamphlets.	No Progress	X			Moved to 3 <sup>rd</sup> and 4 <sup>th</sup> quarters.
	Refine and update EMSWCD web content.	In Progress	X			Ongoing.
Workshops / Education	Provide 1-hour presentations to increase awareness of sustainable landscape issues. 10/year; 200 attendees.	In Progress	X	X	X	1 <sup>st</sup> quarter: 2 presentations, 24 people
	Provide 4-hour natrescaping basics workshops to increase awareness of wildlife/pollinator, water conservation, and water quality issues and residential scale solutions. 6/year; 150 attendees.	In progress	X	X	X	1 <sup>st</sup> quarter: 1 workshop, 20 attendees.
	Provide 4-hour Rain Garden workshops to increase awareness of water quality issues and residential scale solutions. 6/year; 150 attendees.	In progress	X	X	X	1 <sup>st</sup> quarter: 0 workshops (4 scheduled for 2 <sup>nd</sup> quarter.)
	Provide 2-hour native plants workshops to increase awareness of native plant benefits for residential landscapes. 6/year; 150 attendees.	In progress	X	X	X	1 <sup>st</sup> quarter: 2 workshops, 50 attendees
	Provide 2-hour urban weeds workshops to increase awareness of the threats posed by invasive and noxious weeds. 6/year; 150 attendees.	In Progress	X	X	X	1 <sup>st</sup> quarter: 1 workshop, 30 attendees.
	Provide 2-hour Pollinator workshops to increase awareness of wildlife habitat and reduce synthetic chemical use in the landscape. 6/year; 150 attendees.	In Progress	X	X	X	1 <sup>st</sup> quarter: 1 workshop, 20 attendees.
	Provide 2-hour Beneficial Insects workshops to increase awareness of wildlife habitat and reduce the use of synthetic chemicals used in the landscape. 6/year; 150 attendees.	In Progress	X	X	X	1 <sup>st</sup> quarter: 1 workshop, 8 attendees.



Technical and Financial Assistance	Provide technical consultations and site visits to residential, commercial, and industrial landowners. 80/year, 20/quarter.	In progress	X	X	X	1 <sup>st</sup> quarter: 29 non-grant related consults provided.
	Provide technical consultations and site visits to grants program applicants and/or projects. 20 consults/year.	In progress	X	X	X	1 <sup>st</sup> quarter: 4 PIC and SPACE grant related consults provided (3 potential, 1 existing).
	Provide incentives to support installation of residential rain gardens and other sustainable practices in qualifying areas.	In progress	X	X	X	1 <sup>st</sup> quarter: 2 rain garden registrations; 7 rain garden incentive consultations (re: 5 potential, 2 existing).
	Connect with 3 large land managers per year to build relationships, encourage sustainable land management practices, and promote EMSWCD services.	In progress	X	X	X	1 <sup>st</sup> quarter: Meetings with OMSI, River House HOA, Nestani Condominiums, Rose CDC.
Events	Host a native plant sale to support naturescaping principles throughout the EMSWCD service area by providing a diverse selection of affordable native plants to residents. 700 participants; 10,000+ bare-root trees and shrubs sold.	Not Planned	X	X		Native plant sale scheduled for 3 <sup>rd</sup> quarter, with planning starting in the 2 <sup>nd</sup> quarter.
	Offer a naturescaped yards tour to demonstrate and encourage naturescaping principles. 500 attendees.	Not Planned		X	X	Yard Tour scheduled for 4 <sup>th</sup> quarter, with planning starting in the 3 <sup>rd</sup> quarter.
Outreach	Engage new and existing community leaders/groups/organizations in priority areas each quarter. Q1=4, Q2=2, Q3=2, Q4=4.	In progress	X	X	X	1 <sup>st</sup> quarter: 3 meetings, 22 people.
	Provide group tours of the EMSWCD facilities to demonstrate naturescaping principles in practice. 4 tours/year; 100 attendees.	In progress	X	X	X	1 <sup>st</sup> quarter: 1 tour, 5 people.
	Table at community events with literature about EMSWCD programs and events.	In progress	X	X	X	1 <sup>st</sup> quarter: 3 events, 145 people.
	Translate selected workshop and outreach materials. Identify which materials/workshops content should be translated, develop a schedule, identify translation resources/companies, get materials translated.	No Progress	X	X	X	
	Attend 6 community meetings to promote EMSWCD workshops and introduce public to the benefits of sustainable landscaping practices.	In progress	X	X	X	1 <sup>st</sup> quarter: 1 meeting, 20 people.
	Conservation Corner - assess how we utilize the demonstrations at the headquarters office and develop an outreach plan to enhance the visibility and education value of the site.	In progress	X			Ongoing.



Partnerships	Help to guide the development of user-friendly native plants web tool. Participate in Guidance Committee and provide support to Oregon Flora Project as needed to develop the tool.	In Progress	X	X	X	Website interface is being developed and plant data is being loaded.
	Help to guide the development of user-friendly IPM web tool. Participate on review committee.	In progress	X	X	X	Working with OSU to develop contract and scope of work.
	Utilize and promote community organization or non-profit services to increase wildlife and pollinator habitat within targeted neighborhoods via community action projects, workshops and citizen science.	In Progress	X	X	X	Attended/participated in a regional Pollinator Working Group.
	Work with and support PDX Greywater Partnership's efforts to implement the "Greening with Greywater" workshop series.	In Progress	X	X	X	1 <sup>st</sup> quarter: Promoted tour of Greywater systems.
	Collaborate with partner SWCD's towards a more strategic approach to providing more continuity across urban messaging content and possibly workshop offerings.	In Progress	X	X	X	Urban Lands staff have begun to participate in a State-wide communications collaborative.
	Collaborate with Watershed Councils within EMSWCD boundaries.	In progress	X	X	X	1 <sup>st</sup> quarter: Whitney attended 2 JCWC IJC and 2 CSWC tech team meetings.
Demonstration Projects	Work with project partners to draft a 5-year implementation plan for prioritized retrofit projects on the MHCC campus.	In Progress	X			1 <sup>st</sup> quarter: working with Design and construction firm to design and stage first three projects.
	Create an outreach implementation plan for the MHCC retrofit project.	In progress				Participating in the development of the outreach implementation plan at MHCC.
	Develop and initiate contracts and agreements necessary to begin implementation of the three top priority projects on the MHCC Campus.	Complete				Put out RFP for design and construction, contracted with a firm, working with that firm to design first three projects.
	Begin work on the three top priority projects identified in the MHCC assessment.	Not planned		X	X	1 <sup>st</sup> quarter: Design of projects is underway
	Partner with community organizations, jurisdictions and non-profits to identify potential large-scale demonstration projects within targeted neighborhoods. Develop project plans and partnership agreements.	In progress	X	X	X	1 <sup>st</sup> quarter: 2 meetings with OMSI to discuss possible collaboration



CONSERVATION LEGACY Annual Project Activities and Deliverables		Timeframe				1 <sup>st</sup> QUARTER COMMENTS
		Q1	Q2	Q3	Q4	
Headwaters (HW) Program	Finalize Five-Year Headwaters Farm Plan.	Not planned	X	X		Planned for after the conclusion of the 2017-2022 EMSWCD strategic planning.
	Outreach and engagement to prospective farmers, program partners, and the public will be conducted annually through social media, print media, events, presentations, tabling, farm tours, fliers, and press releases.	In progress	X			Met with eleven prospective incubator farmers at Headwaters Farm, brought out 44 members of the general public, wrote a blog about the first HIP graduates, presented and provided table resources at Small Farm School, and ran a Facebook add that reached 7,611.
	Obtain at least ten HIP applicants for the 2018 growing season.	Not planned	X			Applications will be due at the end of October.
	Two-to-five new farms recruited in FY17-18.	Not planned	X	X		The HIP review committee will be meeting on November 14 <sup>th</sup> to consider applications.
	Host at least twelve incubator farmers at all times.	In progress	X	X	X	Target achieved for 1 <sup>st</sup> quarter with 14 incubator farms participating.
HW Site improvements	Construction of a 148' x 30' hoop house.	Not planned		X	X	Construction planned to occur in October.
	Construction of a four-bay, forced air, covered compost facility.	In Progress	X	X	X	Design has been selected (three-bay system chosen) and paperwork for the permitting process has begun. Once permits are obtained bids will be secured for work that will likely take place in late spring.
	Informational, safety, and regulatory signage installed throughout Headwaters Farm.	In Progress	X	X	X	Several safety signs have been put up around the farm and a large, informational sign for the container is in the works.
	Demolition of the residence at 29040 SE Orient Drive; general site improvement.	Complete	X			This work was completed in August and the final permitting has been approved.
	Build an additional wash station to mitigate high demand in existing facility.	In progress	X			The facility has been erected. Build out of the space will occur over winter.
	Build stairs to connect the back of the barn to the prop house and hardening off area.	Not planned	X			A design has been chosen. Construction is scheduled to begin in October.
HW Farmer Support	Tractor safety and operation training.	Not planned		X		This training is scheduled for the 3 <sup>rd</sup> quarter.
	Record keeping cohort, participation in farm business record keeping training.	In Progress		X	X	The current cohort is in progress. The new cohort will begin in the 3 <sup>rd</sup> quarter.
	BCS maintenance and individual farmer operation trainings.	Not planned			X	These trainings will begin in the 4 <sup>th</sup> quarter.
	New farmer orientation.	Not planned		X		This meeting will happen in 3 <sup>rd</sup> quarter.



	Nutrient management training.	Not planned			X	This training will occur in the 4 <sup>th</sup> quarter.
	Irrigation management training.	Not planned			X	This training will occur in the 4 <sup>th</sup> quarter.
	Land access and finance training.	Not planned	X			This training will occur in the 2 <sup>nd</sup> quarter.
	Post-harvest handling training.	Not planned		X		This training will occur in the 3 <sup>rd</sup> quarter.
HW Soil Health	Cover cropping used on all farmable areas of Headwaters Farm while not currently in production (approximately 34 acres possible).	In progress	X	X	X	All winter cover cropping is complete covering an estimated 28 acres. Summer covers will be established in fallowed fields.
	Soil samples taken for all fields in October—both in production or not—to help determine fertility needs and document change.	Not planned		X		Soil samples will be taken by mid-October.
	Management of invasive weeds.	In progress	X		X	Invasive species removal occurred throughout the farm during the 1 <sup>st</sup> quarter. This effort will be continued again in spring once weed pressure begins.
	Lime fields and applications of other amendments as needed.	Not planned	X		X	Soil samples will indicate if liming is needed. Those results are expected in the 2 <sup>nd</sup> quarter.
HW Resource Protection	Realignment of roadway in close proximity of the North Fork of Johnson Creek within the Dianna Pope Natural Area, including 275ft of new gravel road situated away from the water resource and deconstruction and planting of 325ft of the existing roadway.	In Progress			X	Much of the language for the permit has been drafted. A stormwater engineer will be needed to certify the stormwater plan.
	Grass waterway installation (~200ft) paralleling the eastern driveway from the barn down towards the creek.	In Progress	X			This project was designed, and a contractor procured, but the work was not able to be completed due to the onset of the rainy season. It has been put on hold until conditions are more favorable for earthmoving.
	Stormwater trenches backfilled with perforated pipe and drain rock along the driveway that connects the barn and office (~450ft) and the western driveway (350ft).	In Progress	X			This project was designed, and a contractor procured, but the work was not able to be completed due to the onset of the rainy season. It has been put on hold until conditions are more favorable for earthmoving.
	Infiltration ditches on each side of the new hoop house to manage stormwater and reduce flows into the existing grass waterway.	Complete				Both infiltration ditches are installed and will be functional once the hoophouse is erected.
	Establish additional 1,325ft of native hedgerows directly adjacent the western driveway.	In Progress	X	X		The site has been prepared. Planting will occur February.



	Work with incubator farmers to implement a suite of practices that promote good stewardship, including: organic practices, cover cropping, soil amending as needed, properly timed tillage, drip irrigation, reducing compaction, among others.	In Progress	X	X	X	The farmers are implementing conservation agriculture practices and will continue to do so next growing season.
HW Demonstration	Highlight and promote key conservation efforts by keeping an active social media presence and updating the HIP page on the EMSWCD website regularly.	In Progress	X	X	X	Numerous social media posts were made during the 1 <sup>st</sup> quarter, many of which emphasized elements related to conservation.
	Write article on silage tarp bulk purchase for Growing for Market publication.	Complete				This article was written and published in the September edition of Growing For Market.
	Create plan for the incorporation of interpretive signage and other informational documentation at the farm; begin making and displaying signs.	Not planned	X	X		This project will take place after 2018–2022 Strategic planning.
	Lead tours at Headwaters Farm for prospective farmers, program partners, and the general public.	In Progress	X	X	X	Six tours were offered to prospective farmers (11 total visitors) and three to the general public including: Land Access Innovations Land Trust Conference, Center for Alternatives to Pesticides, and Woodlawn Farmers Market (44 visitors).
	Help facilitate training at Small Farm School on land access and evaluation.	Complete				A class was taught on soil health and nutrient management and the land access and evaluation tour was facilitated with help from CCSWCD and OSU Extension.
	Tabling, presentations, events, and other outreach opportunities as they arise.	In Progress	X	X	X	Outreach was conducted at Small Farm School.
Land Legacy Program (LLP)	Finalize 5-year Land Legacy Program plan.	In progress	X	X	X	Two presentations and board briefing packets were completed in the 1 <sup>st</sup> quarter. These include content that will be included or inform the 5-year program plan content.
	Develop and implement outreach program for the Ag community.	In progress	X	X	X	First draft ag outreach plan developed.
	Update and expand Land Legacy content on the EMSWCD website as well as other promotional materials.	Not planned	X	X		Planned for 2 <sup>nd</sup> and 3 <sup>rd</sup> quarters.
	Develop and implement data and project management tracking and filing systems.	In progress	X	X		Program data management software acquired and is being implemented.
	Develop/refine program foundational documents	In progress	X	X		Evaluation and assessment forms/procedures, generic Conservation Easement term sheet, transactions flow-chart, and letter of intent completed.



LLP Farm Lands	Refine agricultural focal area property prioritization and potentially develop similar methodology for non-focal area agricultural properties.	In progress	X	X		Additional factors scoped out, evaluation to follow.
	Provide 4 distinct opportunities for the 75 highest priority landowners to learn about the working lands conservation easement program.	No Progress	X	X	X	Will be implemented with roll-out of outreach program and refinement of program fundamentals.
	Conduct working lands conservation easement valuation analysis.	In progress				Appraisal in progress and due Oct. 31 <sup>st</sup>
	Refine goals of the farmland component of the program.	In progress	X			Draft goals and objectives reviewed in July, to be finalized in 2 <sup>nd</sup> quarter.
	Research and develop farmland conservation techniques.	In progress	X			Draft techniques reviewed in July, to be finalized in 2 <sup>nd</sup> quarter.
	Opportunities rapidly and creatively responded to; two or more properties will be brought before the EMSWCD board to consider for protection.	In progress	X	X	X	1 new property received preliminary approval by the Board, and is under contract with due diligence activities progressing.
	Farm management plan policy developed; District property interests managed in accordance with this policy.	Not planned	X	X	X	Planned for 2 <sup>nd</sup> quarter through 4 <sup>th</sup> quarters.
	Conservation easement management policy (and associated materials) developed.	In progress	X	X		Broad brush recommendations made to Board.
	SWCDs / Land Trust partnerships explored and potentially developed.	In progress	X	X	X	Exploratory conversations had with all (5) Willamette Valley SWCD's considering land conservation.
Farm succession related materials refined/developed and workshop held.	Not planned	X	X	X	2 <sup>nd</sup> quarter – 4 <sup>th</sup> quarter as capacity permits.	
LLP Natural Lands	Refine Natural Lands program goals.	In progress	X			Draft goals and objectives reviewed in September, to be finalized in 2 <sup>nd</sup> quarter.
	Maintain catalogue of relevant partner conservation plans, identify and obtain new partner plans, and to the extent possible, retrieve the associated maps and spatial data to allow for a prioritization of natural areas in need of protection. Work with partners to ensure EMSWCD has the most up to date versions of all relevant plans.	Complete	X	X	X	Completed. Conversations had with 7 partners, plans and priorities identified and mapped. Program staff will continue to engage partners to identify any new plans or changes.
	Meet with potential partners to discuss priority natural areas; if successful, support protection efforts financially with partner entity in the lead.	In progress	X	X	X	Conversations had with 7 partners, consideration of specific project opportunities.





	Evaluate whether existing reactive paradigm should continue or be modified.	In progress	X	X		Recommendations developed for Board consideration during strategic planning.
	Finalize and adopt the long-term management plan for the Dianna Pope Natural Area (DPNA).	Complete				DPNA management plan was finalized and approved by Board in 1 <sup>st</sup> quarter.
	Design and install boundary markers, welcome sign, and interpretive sign in DPNA.	Not planned	X	X	X	Planned for 2 <sup>nd</sup> and 3 <sup>rd</sup> quarters.
	Complete and report on wildlife and plant survey of the DPNA	In progress	X	X		Surveys completed in 1 <sup>st</sup> quarter. Report on the first year of surveys will be drafted in 2 <sup>nd</sup> quarter.
LLP Access Lands	Refine Access to Nature program goals.	In progress	X			Draft goals and objectives reviewed in September, to be finalized in 2 <sup>nd</sup> quarter.
	Maintain catalogue of relevant partner conservation plans, identify and obtain new partner plans, and to the extent possible, retrieve the associated maps and spatial data to allow for a prioritization of access to nature areas in need of protection.	In progress	X	X	X	Conversations had with 7 partners, plans and priorities identified and mapped. Will potentially incorporate additional Portland Parks & Rec analysis around park level of service and potentially apply methodology more broadly.
	Using partner plans and other relevant tools that relate to under-served communities and access to nature; assess and prioritize potential access to nature protection opportunities.	In progress	X	X		Rough assessment completed, but broader decision on general program direction to be secured in 2 <sup>nd</sup> quarter.
	Meet with potential partners to discuss priority access areas; if successful, support protection efforts financially with partner entity in the lead, especially those targeted to under-served communities.	In progress	X	X	X	Conversations had, consideration of specific project opportunities.
	Evaluate whether existing reactive paradigm should continue or be modified.	In progress	X	X		Recommendations developed for Board consideration.
	Complete 5-year Grants Program plan.	Not planned	X	X	X	Planned for after the conclusion of the 2018-2022 strategic planning.
Grants Program	Fund at least one large scale, multi-year restoration project through the PIC Plus or Strategic Partnership Agreement.	Not planned		X	X	PIC and SPA project selection and approval is planned for the 3 <sup>rd</sup> and 4 <sup>th</sup> quarters.
	Fund at least five restoration, naturescaping and/or water quality monitoring projects.	Not planned		X	X	PIC and SPA project selection and approval is planned for the 3 <sup>rd</sup> and 4 <sup>th</sup> quarters.
	Fund at least five projects that address stormwater runoff, water quality/ conservation, and/or soil erosion.	Not planned		X	X	PIC and SPA project selection and approval is planned for the 3 <sup>rd</sup> and 4 <sup>th</sup> quarters.
	Fund at least three project that promotes sustainable agriculture.	Not planned		X	X	PIC project selection and approval is planned for the 3 <sup>rd</sup> and 4 <sup>th</sup> quarters.



Grants - Env. Education	Convene PIC grantees and other key stakeholders involved in environmental education for older youth and/or the green jobs pipeline to: identify the scope of programs in the EMSWCD service area; identify needs and how to address them; and gain input on how we can provide more strategic funding in this area.	Not planned	X			Planned for 2 <sup>nd</sup> quarter.
	Fund at least five mission-specific environmental and/or garden education projects for youth.	Not planned		X	X	PIC project selection and approval is planned for the 3 <sup>rd</sup> and 4 <sup>th</sup> quarters.
	Fund at least five projects that contain an educational component – hands-on involvement of students or volunteers, work skills training (restoration, gardening, sustainable agriculture), and/or demonstration/interpretive element.	In Progress	X	X	X	Four SPACE projects were funded in the first quarter with a strong education component. These included the Pollinator Parkways involvement of volunteers and youth in planting parking strips with pollinators and native plants.
	Fund at least five community events focused on environmental education that reach at least 500 EMSWCD residents through SPACE grants.	In Progress	X	X	X	Five SPACE projects were funded in the first quarter for environmental education events open to the public. One of these was for the 4 <sup>th</sup> Annual Salmon Celebration – an event held at Westmoreland Part with over 20,000 people in attendance.
Grants - Gardens	Re-convene PIC grantees and other key stakeholders involved in school and community gardens to: consider follow-up to the school survey results and mapping projects funded through 2016 PIC grants.	Not planned	X			Planned for 2 <sup>nd</sup> quarter.
	Complete garden needs assessment	Not planned	X		X	Planned for the 2 <sup>nd</sup> and 4 <sup>th</sup> quarters.
	Fund the development of at least three new community or school garden spaces in the District.	Not planned		X	X	PIC project selection and approval is planned for the 3 <sup>rd</sup> and 4 <sup>th</sup> quarters.
	Fund upgrade and/or maintenance of at least five community or school gardens.	In Progress	X	X	X	One SPACE project was funded, supporting upgrades to the Multnomah County Master Gardeners demonstration garden.
	Participate in the Intertwine Greening of Schoolyards collaborative to help implement initiatives focused on increasing the presence of gardens and other green infrastructure on public school grounds.	In Progress	X	X	X	Attended one meeting of Greening Schoolyard Collaborative. Continued communication with the partners.
Grants - Capacity	Support, through grants and/or facilitation, at least two partnerships that cross traditional sector lines and help to build alliances between conservation groups and culturally specific community organizations.	In Progress	X	X	X	Although not planned for this quarter, one SPACE project funded involved the collaboration of Vive Northwest, a culturally specific group working on translation of outreach materials for Northwest Earth Institute.



	Fund at least three projects that help build organizational and technical capacity of organizations to carry out conservation projects.	Not planned		X	X	PIC project selection and approval is planned for the 3 <sup>rd</sup> and 4 <sup>th</sup> quarters.
	Participate in the Equity Grant Makers group, EMSWCD's Equity Team, and training to address barriers to greater equity in grantmaking and conservation funding.	In Progress	X	X	X	Grants Manager has been extensively involved in the EMSWCD Equity Training this quarter. Continued participation in the Equity Grant Makers Group.
	Support, through grants and/or facilitation, at least two partnerships that cross traditional sector lines and help to build alliances between conservation groups and culturally specific community organizations.	Not planned	X	X	X	PIC project selection and approval is planned for the 3 <sup>rd</sup> and 4 <sup>th</sup> quarters.