



## EMSWCD 2<sup>nd</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 second quarter of the financial year (October through December 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:

- **152 activities were planned to be undertaken** within the first quarter of the fiscal year.
- Of these, **146 (96%) have either been completed or are in progress** as planned.
- **6 (4%) have not been undertaken** as planned.

### Significant accomplishments this quarter include:

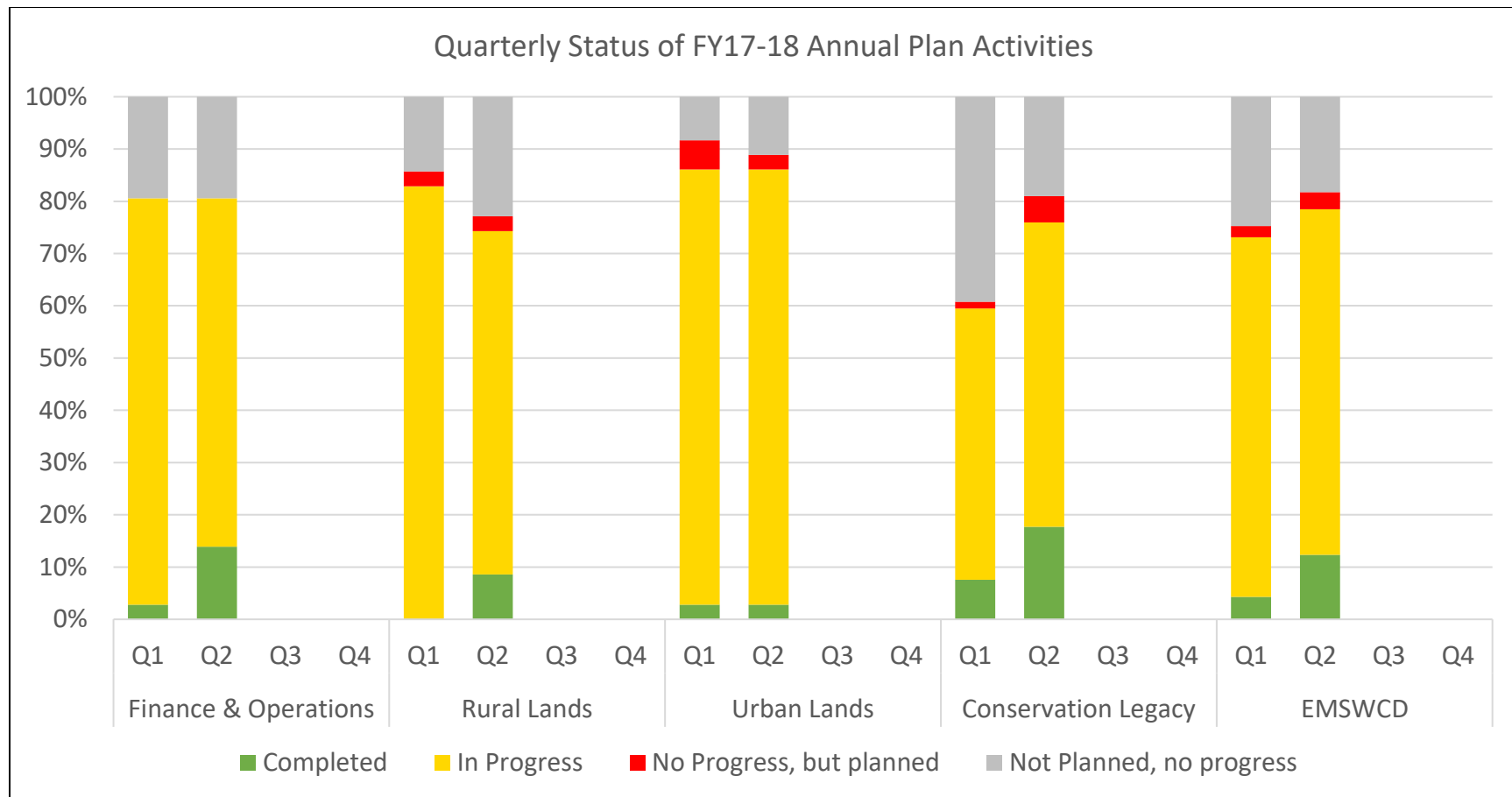
- Completed the financial audit for FY16-17, with no findings of interest.
- Planned for and held the Board/Staff strategic planning retreat.
- Held two new events for nurseries, a listening session for Erosion Solutions, and a field demonstration of erosion control products.
- Began discussions with the US Forest Service concerning weed control on some of the sites that were damaged by the Eagle Creek fire.
- Successfully completed the HIP application process and accepted four new farm businesses for the 2018 growing season.
- Secured PSA for purchase of ag property adjacent to Headwaters, and concluded IGA for contribution to Grant Butte in-fill acquisition.

### Significant activities not accomplished the quarter include:

- Contracting policy review, marketing plan and branding guide, are still in progress but not yet complete.
- Since our District Conservationist position is still vacant, collaboration with USDA-NRCS on cost share has not been possible.
- Translation of Urban Lands outreach materials has not progressed as planned.
- Land Legacy outreach activities has not commenced due to need to do program foundational work (documents, valuation, minimum CE terms) and to pursue pressing land conservation opportunities.



FY17-18 Q2 SUMMARY					
Program Area	No. of Activities	Completed	In Progress	No Progress, but Planned	Not planned during period, no progress
Finance & Operations	36	5 (14%)	24 (67%)	0 (0%)	7 (19%)
Rural Lands	35	3 (9%)	23 (66%)	1 (3%)	8 (23%)
Urban Lands	36	1 (3%)	30 (83%)	1 (3%)	4 (11%)
Conservation Legacy	79	14 (18%)	46 (58%)	4 (5%)	15 (19%)
<b>EMSWCD Total</b>	<b>186</b>	<b>23 (12%)</b>	<b>123 (66%)</b>	<b>6 (3%)</b>	<b>34 (18%)</b>





Expenditures for FY17-18 to date are shown in the table directly below. After the second quarter, a total of 41% of the operational budget has been expended. Finance & Operations (46.6%), Conservation Legacy (53.5%) are the closest in terms of percent spending relative to the percent of the fiscal year elapsed (50%), with Conservation Legacy being ahead in terms of projected expenditure mainly as a result of higher than anticipated due diligence and other expenditures related to the increased number of land deals being pursued. These are followed by Headwaters (40.7%) Rural Lands (40.4%), and Urban Lands (28.40%) which have more season expenditures and/or rely more on partners and other external entities for their work so expenditures are not spread evenly through the year. There were no staff vacancies during the second quarter affecting expenditures.

Category		Purpose	FY 2017-18		
			Total Annual Budget	Actual through Q2	% of Budget Expended
Operations	Finance & Operations	Staffing, facilities, and operations	\$740,890	\$345,058	47%
	Rural Lands	Staffing, contracting, and operations	\$1,087,457	\$438,948	41%
	Urban Lands	Staffing, contracting and operations	\$717,922	\$204,065	28%
	Conservation Legacy	Staffing and operations	\$464,175	\$248,585	54%
	• Headwaters Farm	Farm-specific staff and operations	\$365,948	\$149,041	41%
		<b>Sub-total Operations</b>	<b>\$3,376,392</b>	<b>\$1,385,697</b>	<b>41%</b>
Capital, Grants, & Contingency/Unappropriated	Land Conservation Fund	Acquisitions	\$7,683,426	\$183,200	2%
	Grants	External grants	\$1,960,570	\$519,009	26%
	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>\$702,209</b>	<b>6%</b>
		<b>Total EMSWCD Budget</b>	<b>\$14,193,606</b>	<b>\$2,087,907</b>	<b>15%</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				2 <sup>nd</sup> QUARTER COMMENTS
		Q1	Q2	Q3	Q4	
<b>Budget &amp; Finance</b>	Complete FY16-17 budget audit.	In progress	Complete			The audit is complete. No findings of interest. The report was presented to the Board in December.
	Track FY17-18 budget.	In progress	In progress	X	X	Proceeding as expected with no issues to report.
	Develop FY18-19 budget.	Not planned	Not planned	X	X	Starts in early 2018.
	Review Fiscal Policies and recommend changes as needed.	Not planned	Not planned		X	Planned for 4 <sup>th</sup> quarter.
	Review Contracting Policies and recommend changes as needed.	In progress	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	In progress			Historical data has been input and analysis has begun. Proceeding as planned.
	Review and monitor EMSWCD contractual agreements.	In progress	In progress	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	In progress	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	In progress	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	In progress	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	In progress	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	In progress	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.
	Collaborate with outreach and education staff to assess and evaluate the potential for expanded use of	No progress	No progress			This project has been put on indefinite hold as there does not appear to be a significant need for expanded use of

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



	volunteers in EMSWCD’s activities.					volunteers.
	Research and recommend possible additional “employee well-being” benefits (e.g. HSAs, DCAPs, commute incentives).	Not planned	Not planned		X	
	Review health and other insurance benefits to determine if changes or enhancements are needed for upcoming fiscal year.	Not planned	Not planned		X	
	Review and update Employee Handbook in conjunction with Personnel Policies.	In progress	In progress			Updating Policy Notebook as policies are created and approved.
	Plan logistics for and coordinate strategic planning retreat.	In progress	Complete			Board & staff planning retreat took place on Nov 6-8.
	Onboarding of 3-5 new associate directors.	In progress	Complete			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	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	In progress	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	In progress	X	X	Progressing as planned, no issues to report.
<b>Facilities</b>	General maintenance of buildings, equipment and facilities at Headwaters Farm.	In progress	In progress	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	In progress	X	X	Progressing as planned, no issues to report.
	General maintenance of building, state vehicles and facilities at Williams Headquarters.	In progress	In progress	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	Complete			List was compiled and presented to the board at the Staff/Board retreat in November.
<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	In progress			In progress. Restructuring Marketing Plan and incorporating latest survey data.



Refine the Branding/Style/Identity Guide companion to the Marketing Plan to ensure consistency in messaging and outreach materials	In progress	In progress			In progress. Developed another updated version of the guide, worked in further additions and changes, final draft nearly complete.
Analyze data collected from FY16-17 marketing survey to inform future marketing and outreach efforts.	In progress	In progress			In progress. Utilized and examined related data for plant sale and workshops, working into Marketing Plan and planning efforts.
Implement revised Marketing Plan, monitor progress and make course changes as needed.	Not planned	Not planned	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	In progress	X	X	In progress. Performed extensive overhaul to the website's back end, plugins, files, databases, etc. to optimize its efficiency. Continually updated parts of the website. Developed and tested plant sale. Edited and posted front page posts. Archived old content.
Develop and integrate social media to drive traffic to website, encourage event participation and promote conservation practices.	In progress	In progress	X	X	In progress. Continuing to use and expand social media. Created several Facebook ads, promoted workshops, grew social media fan base.
Perform web and social media analytics to determine efficacy of marketing efforts and action-driven web content.	In progress	In progress	X	X	In progress. Have performed small- and large-scale analytics on workshops, campaigns and long-term analytics for marketing planning.
Assist with outreach, press releases and media contacts.	In progress	In progress	X	X	In progress. Worked with Conservation Legacy staff to draft and edit press releases, articles and web content. 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	In progress	X	X	In progress. Created or managed several print and social media ads with program staff.
Coordinate printing for all mailing and outreach materials.	In progress	In progress	X	X	In progress. Have worked with Urban and Rural Lands programs to develop print materials and/or send them to print/mail.
Refine display and material templates as needed by programs.	In progress	Not planned	X	X	No progress, not planned. Discussed templates with program staff and assisted them with existing template files.



RURAL LANDS Annual Project Activities and Deliverables		Timeframe				2 <sup>st</sup> QUARTER COMMENTS
		Q1	Q2	Q3	Q4	
Rural Water Quality	Complete the five-year program plan.	In progress	In progress	X		Work in 1 <sup>st</sup> quarter focused on preparation for strategic planning. The 5-year plan will continue after the strategic plan is finished.
	Develop an outreach strategy and calendar for each program area.	In progress	In progress			2 <sup>nd</sup> quarter: Completed for StreamCare and under development for Weed Control. 1 <sup>st</sup> quarter: 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	In progress	X	X	Erosion Solutions nursery listening session attended by 15 and field demo attended by 10 participants in 2 <sup>nd</sup> quarter. Tabled at Small Farm School in 1 <sup>st</sup> quarter.
	Prioritize outreach in our ODA Ag water quality focus area (Beaver Creek HUC).	In progress	In progress	X	X	Held a horse and livestock workshop that 25 participants attended 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	Not planned		X	The NW Ag Show was cancelled for 2018; not sure if it will happen in future years. In 1 <sup>st</sup> quarter, Far West Show booth completed. Topic was beneficial insects; developed an easy to use guide with Clackamas SWCD. Also gave two presentations at the Far West Show on erosion and irrigation. Planning for the next Far West Show to occur during the 4 <sup>th</sup> quarter.
	Collect and analyze monthly samples in upper Beaver and Johnson Creeks.	In progress	In progress	X	X	Completed monthly sampling. Began work to update the monitoring plans.
	Install continuous temperature loggers in upper Beaver Creek, upper Johnson Creek, Big Creek and Smith Creek.	In progress	Not planned		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	In progress	X	X	2 <sup>nd</sup> quarter - 17 site visits; 4 first-time. 1 <sup>st</sup> quarter - 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	In progress	X	X	Four practice recommendations developed 2 <sup>nd</sup> quarter. Nine practice recommendations developed 1 <sup>st</sup> quarter.
	Assist 4 landowners with cost share applications.	In progress	In progress	X	X	Two cost share applications are in progress.
Partner with NRCS to promote and deliver cost share assistance.	In progress	Not planned	X	X	Since our District Conservationist position is still vacant, it is unlikely this will be possible this fiscal year. Changed timeframe to 'not planned' for quarters 2, 3, and 4.	
Identify specific ways to overcome the barriers to	In progress	In progress			More outreach and relationship building with OAN, local	



	addressing erosion.					OAN chapter, and individual nurseries.
	Identify and implement erosion prevention demonstration projects.	In progress	In progress	X	X	Held a field demonstration of the installation of erosion prevention products 2 <sup>nd</sup> quarter.
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	In progress	X	X	For 2 <sup>nd</sup> quarter, 61 acres maintained. 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	In progress	X		2 <sup>nd</sup> quarter- 3.2 new acres prepared for planting. 350 live stakes planted on 0.2 acres. 1 <sup>st</sup> quarter- 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	In progress	X	X	Labor crew availability limited progress in 1 <sup>st</sup> quarter.
	Maintain GPS and GIS data; track and compile deliverables.	In progress	In progress	X	X	Ongoing. Progressing as planned.
	Manage wholesale plant orders, delivery, and storage.	In progress	In progress	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	Not planned			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	No progress	X	X	Due to staff limitations at ODFW, this item will likely not happen this fiscal year.
	Develop options for offering easements on graduated StreamCare sites.	In progress	In progress	X	X	Options have been identified and discussed with Land Legacy staff. This was explored at strategic planning, but is unlikely given staffing and funding constraints.
Weed Control	Complete five-year program plan	In progress	In progress	X		Work in 1 <sup>st</sup> and 2 <sup>nd</sup> quarters focused on preparation for strategic planning. The 5-year plan will continue after the strategic plan is finished.
	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	In progress	X	X	No reports of EDRR weeds during 1 <sup>st</sup> and 2 <sup>nd</sup> quarters.
	Provide technical assistance with weed identification and control methods.	In progress	In progress	X	X	Responded to calls and emails.
	Participate in both the 4-county and Columbia Gorge Cooperative Weed Management Areas.	In progress	In progress	X	X	Helped plan for the 4-county CWMA Pull Together event and updates and translations for the weed fact sheets.
	Re-visit knotweed sites and continue to treat any new	In progress	Complete			2 <sup>nd</sup> quarter- 6,125 sqft treated. 1 <sup>st</sup> quarter - ~1 acre of





growth.					knotweed infestation treated on private property.
Continue to survey for additional knotweed; obtain permission and treat sites.	In progress	Complete			2 <sup>nd</sup> quarter- 4 acres surveyed and 1,615 sqft treated. 1 <sup>st</sup> quarter no additional knotweed infestations found.
Continue to annually treat all known satellite populations of garlic mustard to prevent seed set.	In progress	In progress	X	X	Fall treatment of garlic mustard on 3 acres completed 1 <sup>st</sup> quarter, and another 3.5 acres 2 <sup>nd</sup> quarter.
Continue to survey for and treat new satellite populations of garlic mustard.	Not planned	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	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	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	In progress	X	X	2 <sup>nd</sup> quarter: surveyed 4 acres of public land for ivy and old man’s beard; 0.25 and 0.1 acres found. 1 <sup>st</sup> quarter: 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	In progress	X	X	The majority of planned false brome control could not happen due to the Eagle Creek fire. 2 <sup>nd</sup> quarter: controlled 431 sqft of old man’s beard and 54 sqft of ivy. 1 <sup>st</sup> quarter: controlled 75 sqft of false brome 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	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	Complete			Completed and incorporated into strategic planning presentation 2 <sup>nd</sup> quarter.



URBAN LANDS Annual Project Activities and Deliverables		Timeframe				2 <sup>st</sup> QUARTER COMMENTS
		Q1	Q2	Q3	Q4	
Urban Program	Complete the five-year program plan.	In Progress	In Progress	X		1 <sup>st</sup> quarter: Draft awaiting strategic planning input. 2 <sup>nd</sup> quarter: Processing input from Strategic Planning Session
	Pilot Project: Engage one education and outreach intern for Urban Lands workshop coordination	In Progress	In Progress	X	X	Intern is in place.
	Define program monitoring and evaluation metrics.	In Progress	In Progress	X		1 <sup>st</sup> quarter: Meeting with partners to determine regional efforts. 2 <sup>nd</sup> quarter: Gathering internal and external monitoring and evaluation information.
	Complete research of affordable housing developments and how we might engage them with new CLIP opportunities.	In progress	In progress			1 <sup>st</sup> quarter: Several internal meetings re: revising urban CLIP and applying equity lens. 2 <sup>nd</sup> quarter: Finalized urban CLIP revised guidelines.
	Develop 3 new printed outreach pamphlets.	No Progress	Not planned			Moved to 3 <sup>rd</sup> and 4 <sup>th</sup> quarters.
	Refine and update EMSWCD web content.	In Progress	In progress			Moved to 3 <sup>rd</sup> quarter.
Workshops / Education	Provide 1-hour presentations to increase awareness of sustainable landscape issues. 10/year; 200 attendees.	In Progress	In progress	X	X	1 <sup>st</sup> quarter: 2 presentations, 24 people. 2 <sup>nd</sup> quarter: 5 presentations, 61 people.
	Provide 4-hour naturescaping basics workshops to increase awareness of wildlife/pollinator, water conservation, and water quality issues and residential scale solutions. 6/year; 150 attendees.	In progress	In progress	X	X	1 <sup>st</sup> quarter: 1 workshop, 20 attendees. 2 <sup>nd</sup> quarter: 3 workshops, 77 attendees.
	Provide 4-hour Rain Garden workshops to increase awareness of water quality issues and residential scale solutions. 6/year; 150 attendees.	In progress	In progress	X	X	1 <sup>st</sup> quarter: 0 workshops 2 <sup>nd</sup> quarter: 4 workshops, 76 attendees.
	Provide 2-hour native plants workshops to increase awareness of native plant benefits for residential landscapes. 6/year; 150 attendees.	In progress	In progress	X	X	1 <sup>st</sup> quarter: 2 workshops, 50 attendees. 2 <sup>nd</sup> quarter: 2 workshops, 27 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	In progress	X	X	1 <sup>st</sup> quarter: 1 workshop, 30 attendees. 2 <sup>nd</sup> quarter: 2 workshops, 47 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	In progress	X	X	1 <sup>st</sup> quarter: 1 workshop, 20 attendees. 2 <sup>nd</sup> quarter: 3 workshops, 48 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	In progress	X	X	1 <sup>st</sup> quarter: 1 workshop, 8 attendees. 2 <sup>nd</sup> quarter: 2 workshops, 16 attendees.
Technical and Financial Assistance	Provide technical consultations and site visits to residential, commercial, and industrial landowners. 80/year, 20/quarter.	In progress	In progress	X	X	1 <sup>st</sup> quarter: 29 non-grant related consults provided. 2 <sup>nd</sup> quarter: 24 individuals contacted for tech assist.
	Provide technical consultations and site visits to grants program applicants and/or projects. 20 consults/year.	In progress	In progress	X	X	1 <sup>st</sup> quarter: 4 PIC and SPACE grant related consults provided (3 potential, 1 existing). 2 <sup>nd</sup> quarter: provided technical assistance to 4 grant program participants and applicants
	Provide incentives to support installation of residential rain gardens and other sustainable practices in qualifying areas.	In progress	In progress	X	X	1 <sup>st</sup> quarter: 2 rain garden registrations; 7 rain garden incentive consultations (re: 5 potential, 2 existing). 2 <sup>nd</sup> quarter: 2 incentive visits, 3 registrations, 1 consultation and 1 incentive follow-up.
	Connect with 3 large land managers per year to build relationships, encourage sustainable land management practices, and promote EMSWCD services.	In progress	In progress	X	X	1 <sup>st</sup> quarter: Meetings with OMSI, River House HOA, Nestani Condominiums, Rose CDC. 2 <sup>nd</sup> quarter: Discussions and meetings with River House HOA, Fairview Terrace, Rose CDC, Treehill Park HOA
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	In progress	X		1 <sup>st</sup> quarter: Nothing planned. 2 <sup>nd</sup> quarter: Planning for event.
	Offer a naturescaped yards tour to demonstrate and encourage naturescaping principles. 500 attendees.	Not Planned	Not Planned	X	X	Yard Tour scheduled for 4 <sup>th</sup> quarter, with planning to start 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	In progress	X	X	1 <sup>st</sup> quarter: 3 meetings, 22 people. 2 <sup>nd</sup> quarter: 4 meetings, 117 people.
	Provide group tours of the EMSWCD facilities to demonstrate naturescaping principles in practice. 4 tours/year; 100 attendees.	In progress	In progress	X	X	1 <sup>st</sup> quarter: 1 tour, 5 people. 2 <sup>nd</sup> quarter: 2 tours, 50 people
	Table at community events with literature about EMSWCD programs and events.	In progress	In progress	X	X	1 <sup>st</sup> quarter: 3 events, 145 people. 2 <sup>nd</sup> quarter: 3 events, 710 people.
	Translate selected workshop and outreach materials. Identify which materials/workshops content should be translated, develop a schedule, identify translation	No Progress	No Progress	X	X	Assisted in the translation of CWMA fact sheets. Work still being done to identify internal materials for translation.



	resources/companies, get materials translated.					
	Attend 6 community meetings to promote EMSWCD workshops and introduce public to the benefits of sustainable landscaping practices.	In progress	In progress	X	X	1 <sup>st</sup> quarter: 1 meeting, 20 people. 2 <sup>nd</sup> quarter: 3 meetings, 102 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	In progress			2 <sup>nd</sup> quarter: Conservation Corner team has begun planning for long-term design, implementation, maintenance and outreach opportunities for the site.
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	In Progress	X	X	1 <sup>st</sup> quarter: Website interface is being developed and plant data is being loaded. 2 <sup>nd</sup> quarter: Participated on steering committee. Initial stage of web tool is set to go public in 3 <sup>rd</sup> quarter.
	Help to guide the development of user-friendly IPM web tool. Participate on review committee.	In progress	In Progress	X	X	1 <sup>st</sup> quarter: Working with OSU to develop contract and scope of work. 2 <sup>nd</sup> quarter: Attend steering committee meetings, helped create "Statement of Purpose" and structure of work groups.
	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	In Progress	X	X	1 <sup>st</sup> quarter: Attended/participated in a regional Pollinator Working Group. 2 <sup>nd</sup> quarter: met with/attended meetings for: Grant Butte partnership, Gabbert Butte partnership, and Verde/Habitat for Humanity/CSWC raingarden initiative.
	Work with and support PDX Greywater Partnership's efforts to implement the "Greening with Greywater" workshop series.	In Progress	In Progress	X	X	1 <sup>st</sup> quarter: Promoted tour of Greywater systems. 2 <sup>nd</sup> quarter: Helped to promote the workshop series.
	Collaborate with partner SWCD's towards a more strategic approach to providing more continuity across urban messaging content and possibly workshop offerings.	In Progress	In Progress	X	X	Urban Lands staff have begun to participate in a State-wide communications collaborative (Clean Rivers Coalition).
	Collaborate with Watershed Councils within EMSWCD boundaries.	In progress	In progress	X	X	1 <sup>st</sup> quarter: Urban Lands staff attend CSWC Board meetings, JCWC IJC meetings and Beaver Creek Partnership meetings. 2 <sup>nd</sup> quarter: Urban Lands staff attends CSWC Board meetings, JCWC IJC meetings, Beaver Creek Partnership, and feasibility meeting of Multnomah (or Lower Willamette) Watershed Council.
	Work with project partners to draft a 5-year	In Progress	In Progress			1 <sup>st</sup> quarter: Working with design and construction firm to



implementation plan for prioritized retrofit projects on the MHCC campus.					design and stage first three projects. 2 <sup>nd</sup> quarter: Review draft designs and attend steering committee.
Create an outreach implementation plan for the MHCC retrofit project.	In progress	Not planned			1 <sup>st</sup> quarter: Participating in the development of the outreach implementation plan at MHCC. 2 <sup>nd</sup> quarter: Assisting SRBWC in their efforts as lead in this area.
Develop and initiate contracts and agreements necessary to begin implementation of the three top priority projects on the MHCC Campus.	Complete	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	Not Planned	X	X	1 <sup>st</sup> quarter: Design of projects is underway 2 <sup>nd</sup> quarter: 90% designs are underway. RFP will go out and construction is planned to begin in 3 <sup>rd</sup> quarter.
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	In progress	X	X	1 <sup>st</sup> quarter: 2 meetings with OMSI to discuss possible collaboration. 2 <sup>nd</sup> quarter: Meetings, conversations, and contacts with Rose CDC, Portland Community Gardens, Wood Village, Fairview, and Troutdale to (re)establish and explore partnership opportunities.



CONSERVATION LEGACY Annual Project Activities and Deliverables		Timeframe				2 <sup>st</sup> QUARTER COMMENTS
		Q1	Q2	Q3	Q4	
Headwaters (HW) Program	Finalize Five-Year Headwaters Farm Plan.	Not planned	Not planned	X		Planned for after the conclusion of the 2018-2023 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	In progress			Provided tour and training to Clackamas Community College's Organic Farming Class of 25 students; offered tours to farmers from Outgrowing Hunger and the Oregon Food Bank; held on-farm meetings with five prospective incubator farmers.
	Obtain at least ten HIP applicants for the 2018 growing season.	Not planned	Complete			10 applications were received.
	Two-to-five new farms recruited in FY17-18.	Not planned	Complete	X		Four new farm businesses were accepted into HIP for the 2018 growing season.
	Host at least twelve incubator farmers at all times.	In progress	Complete	X	X	Just as in 2017, there will be 14 farm businesses participating in HIP in 2018.
HW Site Improvements	Construction of a 148' x 30' hoop house.	Not planned	In progress	X	X	Construction of the structure is complete, and the poly skin will be put on once temperatures are warmer.
	Construction of a four-bay, forced air, covered compost facility.	In progress	In progress	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	In progress	X	X	Several safety signs have been put up around the farm and a large, informational sign has been installed on the container.
	Demolition of the residence at 29040 SE Orient Drive; general site improvement.	Complete	Complete			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	In progress			The new structure has been erected, plumbed to the water system, and the floor covered in pea gravel. Build out of the space will occur in March.
	Build stairs to connect the back of the barn to the prop house and hardening off area.	Not planned	Complete			A wide, solid juniper stairway with packed gravel was installed to allow for foot traffic between HIP facilities without causing erosion on the slope.
HW Farmer Support	Tractor safety and operation training.	Not planned	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	In progress	X	X	January and February meeting dates have been set to begin the record keeping program.
	BCS maintenance and individual farmer operation	Not planned	Not planned		X	These trainings will begin in the 4 <sup>th</sup> quarter.



	trainings.					
	New farmer orientation.	Not planned	In progress	X		This training is scheduled to happen on February 6 <sup>th</sup> .
	Nutrient management training.	Not planned	Not planned		X	This training will occur in the 4 <sup>th</sup> quarter.
	Irrigation management training.	Not planned	Not planned		X	This training will occur in the 4 <sup>th</sup> quarter.
	Land access and finance training.	Not planned	In progress			This training will occur in early March.
	Post-harvest handling training.	Not planned	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	In progress	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	Complete	X		Soil samples were taken in mid-October before significant rain events.
	Management of invasive weeds.	In progress	In progress		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	Complete		X	Soil samples have indicated that liming is not needed this year.
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	In progress		X	A stormwater engineering firm is under contract to support in the permitting process. That work is underway.
	Grass waterway installation (~200ft) paralleling the eastern driveway from the barn down towards the creek.	In progress	In progress			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	In progress			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	Complete			Both infiltration ditches are installed and will be functional once the hoophouse poly skin is installed.
	Establish additional 1,325ft of native hedgerows	In Progress	In Progress	X		The site has been prepared. Planting will occur in



	directly adjacent the western driveway.					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	In Progress	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	In Progress	X	X	Numerous social media posts were made during the 2 <sup>nd</sup> quarter, many of which were targeted at getting applicants and raising awareness for the incubator program. Several Facebook adds were placed.
	Write article on silage tarp bulk purchase for Growing for Market publication.	Complete	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	Not planned	X		This project will take place after 2018–2023 strategic planning.
	Lead tours at Headwaters Farm for prospective farmers, program partners, and the general public.	In Progress	In Progress	X	X	Five prospective farmers visited Headwaters Farm. Other partner organizations (Outgrowing Hunger, Oregon Food Bank, and Clackamas Community College) also attended. There were a total of 36 visitors as part of structured tours at Headwaters Farm in 2 <sup>nd</sup> quarter.
	Help facilitate training at Small Farm School on land access and evaluation.	Complete	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	In progress	X	X	Outreach and networking was conducted at the annual National Incubator Farm Training Initiative’s Field School and also at the Portland Region Farmer Development Coalition meeting.
Land Legacy Program (LLP)	Finalize 5-year Land Legacy Program plan.	In progress	In progress	X	X	Substantive presentation/discussion at Board Retreat.
	Develop and implement outreach program for the Ag community.	In progress	In progress	X	X	Outreach plan refined, messaging developed, some conversations with influential Ag sector leaders held.
	Update and expand Land Legacy content on the EMSWCD website as well as other promotional materials.	Not planned	In progress	X		Webpage content revisions commenced in 2 <sup>nd</sup> quarter.
	Develop and implement data and project management tracking and filing systems.	In progress	In progress	X		“Landscape” software implemented, closing transactions policy and filing system finalized.





	Develop/refine program foundational documents	In progress	In progress	X		Board approval form, transaction guidelines, working farmland easement term sheet, tax benefits, disclosures and acknowledgements, closing checklist completed or refined.
LLP Farm Lands	Refine agricultural focal area property prioritization and potentially develop similar methodology for non-focal area agricultural properties.	In progress	No Progress	X		Deferred due to low urgency for product and given competing priorities for available capacity.
	Provide 4 distinct opportunities for the 75 highest priority landowners to learn about the working lands conservation easement program.	No Progress	In progress	X	X	Most program development work has gone to program fundamentals (valuation info, CE terms), with limited work on outreach. Some conversations were held with leading ag producers to get feedback on the program.
	Conduct working lands conservation easement valuation analysis.	In progress	Complete			Valuation completed, info shared with relevant partners.
	Refine goals of the farmland component of the program.	In progress	In progress			Presented to Board to general agreement, awaiting strategic planning conclusion.
	Research and develop farmland conservation techniques.	In progress	Complete			Recommendations to LLC made and accepted.
	Opportunities rapidly and creatively responded to; two or more properties will be brought before the EMSWCD board to consider for protection.	In progress	In progress	X	X	Mishima property proceeding to closing. Multiple other opportunities engaged with.
	Farm management plan policy developed; District property interests managed in accordance with this policy.	Not planned	In progress	X	X	Began development of Mishima Ag Management Plan
	Conservation easement management policy (and associated materials) developed.	In progress	In progress	X		Broad brush recommendations made to Board.
	SWCDs / Land Trust partnerships explored and potentially developed.	In progress	In progress	X	X	Meaningful collaboration with COLT and Land Trusts, SWCDs established and ongoing.
Farm succession related materials refined/developed and workshop held.	Not planned	No Progress	X	X	No capacity to pursue given other priorities.	
LLP Natural Lands	Refine Natural Lands program goals.	In progress	In progress			Presented to Board, awaiting strategic planning conclusion and clarification re budget.
	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	Complete	X	X	Relevant partners plans have been obtained. Staff will continue to identify new or revised plans with partners as opportunities arise.



	Meet with potential partners to discuss priority natural areas; if successful, support protection efforts financially with partner entity in the lead.	In progress	In progress	X	X	Secured IGA and managed contribution to Grant Butte transaction. Continued to remain available reactively.
	Evaluate whether existing reactive paradigm should continue or be modified.	In progress	In progress	X		Presented to Board, awaiting strategic planning conclusion and clarification re budget.
	Finalize and adopt the long-term management plan for the Dianna Pope Natural Area (DPNA).	Complete	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	In progress	X	X	Boundary markers have been selected and procured, to be installed in 3 <sup>rd</sup> quarter.
	Complete and report on wildlife and plant survey of the DPNA	In progress	In progress	X		Surveys completed in 1 <sup>st</sup> quarter. Report on the first year of surveys was drafted in 2 <sup>nd</sup> quarter, to be finalized in 3 <sup>rd</sup> quarter.
LLP Access Lands	Refine Access to Nature program goals.	In progress	In progress			Presented to Board, awaiting strategic planning conclusion and clarification re budget.
	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	In progress	X	X	Some partner plans have been obtained. Limited progress made on this in the 2 <sup>nd</sup> quarter, given other priorities.
	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	In progress	X		Deferred awaiting decision on general program direction.
	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	In progress	X	X	Continue to remain available reactively.
	Evaluate whether existing reactive paradigm should continue or be modified.	In progress	In progress	X		Presented to Board, awaiting strategic planning conclusion and clarification re budget.
Grants Program	Complete 5-year Grants Program plan.	Not planned	Not planned	X	X	Planned for after the conclusion of the 2018-2022 strategic planning.
	Fund at least one large scale, multi-year restoration project through the PIC Plus or Strategic Partnership Agreement.	Not planned	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	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	Not planned	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.



	erosion.					
	Fund at least three project that promotes sustainable agriculture.	Not planned	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	No progress			Postponed, awaiting determination of priority in strategic planning and information to ensure not duplicating efforts with other partner agencies pursuing similar convenings around environmental education.
	Fund at least five mission-specific environmental and/or garden education projects for youth.	Not planned	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	In Progress	X	X	Four SPACE projects were funded in the 1 <sup>st</sup> quarter with a strong education component. These included the Oregon Youth Outreach to support 6 conservation stewardship field trips to remove invasive plants, clear trails and rehabilitate wildlife habitat in natural areas throughout the District.
	Fund at least five community events focused on environmental education that reach at least 500 EMSWCD residents through SPACE grants.	In Progress	In Progress	X	X	Three SPACE projects were funded in the 2 <sup>nd</sup> quarter for environmental education events open to the public. One of these was to support Confluence, hosting a community service day in the Sandy River Delta to improve trails, remove trash, and plant native plants. Twenty-five volunteers participated in the event.
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	No progress			This was postponed due to strategic planning. Will reschedule post PIC 2018 decisions.
	Complete garden needs assessment	Not planned	In progress		X	Planned for the 2 <sup>nd</sup> and 4 <sup>th</sup> quarters. Follow-up survey was conducted by consultant for Intertwine, data is still to be incorporated into existing data sets and map.
	Fund the development of at least three new community or school garden spaces in the District.	Not planned	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	In Progress	X	X	One SPACE project was funded, supporting upgrades to a garden operated by Birch Community Services, that provides “teaching garden” opportunities and produce to needy families.
	Participate in the Intertwine Greening of Schoolyards	In Progress	In Progress	X	X	There was no meeting held in the 2 <sup>nd</sup> quarter. Continue to



	collaborative to help implement initiatives focused on increasing the presence of gardens and other green infrastructure on public school grounds.					exchange emails with group members. They plan to reconvene in the new year.
<b>Grants - Capacity</b>	Fund at least three projects that help build organizational and technical capacity of organizations to carry out conservation projects.	Not planned	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	In Progress	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	In Progress	X	X	PIC project selection and approval is planned for the 3 <sup>rd</sup> and 4 <sup>th</sup> quarters. In consultation with PIC applicants, encouraged and promoted cross sector strategies.