

September 15-16, 2009 OWEB Board Meeting
Executive Director Update #C-9: Small Grant Program Review

Background

Oregon Administrative Rule 695-35-0070 directs OWEB to review reports submitted by the Small Grant Teams and evaluate the need for program improvements and administrative rule changes once a biennium. As previously reported to the Board, staff committed to conducting a review of the Small Grant Program following the end of the 2009 legislative session. For additional detail about how the Small Grant Program works, staff has provided an overview (Attachment A) which steps through the program from the beginning of a biennium to the end.

Staff have begun to review the program by scheduling several “listening” tours, which combine visits to completed small grant project sites and discussion with small grant team members. Staff is also reviewing the biennial reports submitted by Small Grant Teams as they come in (the report due date is August 30, 2009). The table below outlines the tentative timeline for the program review.

Small Grant Program Review Timeline

Timing	Activity
July 1-September 30	Review Small Grant Team Biennial Reports; summarize comments; develop list of issues and OWEB proposals on how to respond/address
July-October	Site/Listening Tours with Small Grant Teams (4 around the state)
October-December	Meet with Small Grant Teams around the state (6-8 meetings) to discuss list of issues compiled from reports and discussions; discuss OWEB proposals to address or respond to issues.
January	Update Board Determine whether rule changes are needed
February	If rule changes needed, convene Rules Advisory Committee
June	Placeholder for Board adoption of any needed rule changes

Staff have also reviewed reports written by Hugh Barrett regarding the relative success of OWEB juniper treatment projects he visited. Bev Goodreau, Grant Program Specialist, and Courtney Shaff, Grant Program Coordinator, developed a small grant juniper project checklist based on Mr. Barrett’s juniper project guidance materials, together with input from several Small Grant Teams. The checklist (Attachment B) outlines key elements of a successful juniper project, providing guidance for Small Grant applicants and Small Grant Team application review committees.

Staff Contact

If you have questions or need additional information, please contact Bev Goodreau, Grant Program Specialist, at bev.goodreau@state.or.us or 503-986-0187.

Attachments:

- A. Small Grant Program Overview
- B. Guidance for the Planning and Review of Small Grant Juniper Projects

Small Grant Program Overview

- There are 28 Small Grant areas around the state.
- Each team is made up of watershed councils (WSCs), soil and water conservation districts (SWCDs) and tribes in that area. At least one WSC and one SWCD are required to make up a team.
- The OWEB Board has funded the Small Grant Program at \$2.8 million (\$100,000 per team) every biennium since its inception in the 2001-2003 biennium.
- Each biennium, teams develop new bylaws and select priority watershed concerns using an OWEB boilerplate document.
- Once a team's bylaws and priority watershed concerns have been approved and it is determined there are no outstanding OWEB reports/advances for which a team member is the grantee, a team grant agreement for \$100,000 is written by OWEB and signed by OWEB and the team.
- Projects recommended by the team may be funded for a maximum of \$10,000.
- OWEB Small Grant rules list the acceptable project types, which are fairly prescriptive.
- Small Grant Teams develop their own application deadlines and review dates. Teams must evaluate applications, deciding whether to recommend projects to OWEB for funding.
- Teams also develop their own outreach methods to let landowners know about the program—such as newsletters, meetings, Web sites, county fairs and word-of-mouth.
- Once an application has been recommended by the team it is sent with a signed project grant agreement and supporting documents to OWEB for review.
- If the application meets OWEB's criteria and the grantee has no outstanding OWEB reports or advances, the grant agreement is signed by OWEB and entered into the database.
- Small Grants must have 25% match funding
- Small Grants must be completed within 2 years after being recommended for funding.
- A completion report including the OWRI (Restoration) reporting form, map, and photos are required 60 days after the project completion.
- A Year-Two Status Report and photos are required two years after project completion.
- Small Grant Program funding may only be used during the current biennium and cannot be carried over into the next biennium
- Each Small Grant Team is required to submit a Biennial Report 60 days after the end of the biennium

Guidance for the Planning and Review of Small Grant Juniper Projects

When planning and/or evaluating juniper projects under OWEB's small grant program it is important to consider the long-term success and maintenance of the project and its ecological benefit. Applicants should answer these questions as part of the *Problem* or *Solution* narrative portion of the application. These questions are intended to help both the applicant and the reviewers evaluate whether the benefits from the juniper project are proportionate to the site potential, the degree of encroachment, and the length of time the site has been subject to the effects of occupation. If the questions are not answered, reviewers may ask applicants for additional information via email. This form is required to be sent in to OWEB with every small grant application for juniper management projects along with any additional information the applicant may have been asked to provide.

OWEB has published several guidance documents related to juniper management. We recommend reading the references listed below prior to planning and implementing any juniper management projects.

Western Juniper Management: A Field Guide

<http://oregon.gov/OWEB/MONITOR/docs/WesternJuniperManagementFieldGuide.pdf>

Juniper Management in the Crooked River Watershed

http://oregon.gov/OWEB/MONITOR/docs/ContrastingJuniperManagement_CrookedRiver.pdf

Juniper Removal Evaluation: Phase I and II Final Reports

http://oregon.gov/OWEB/MONITOR/docs/juniper_report.pdf

http://oregon.gov/OWEB/MONITOR/docs/Juniper_PhaseII_report.pdf

1) What is the phase of juniper woodland succession? (*see attached sheet*)

- Phase I Phase II Phase III

2) Has the existing vegetation structure, aspect and slope of the site been described? Has the applicant addressed whether or not seeding is needed?

- Yes No

3) Is there a grazing strategy for the site?

- Yes No

If not, the applicant has clearly explained why it is unnecessary.

- Yes No

4) Has a long-term management plan for the juniper site been discussed and identified? (*Using chainsaws and loppers to maintain in the long-term, Burning in 10 year*)

- Yes No

5) Is the project located near any other juniper treatment projects either completed or planned? (*Does not have to be OWEB funded*)

- Yes No Unknown

If yes, how do they relate? (*Examples: adjacent to other juniper or rangeland health projects, part of CREP or a watershed restoration plan*)

6) Is the ecological benefit of the juniper project clearly articulated?

- Yes No

Woodland Succession of Juniper

The full gradient of juniper encroachment extends from the period of seed introduction and germination, through stand maturation, to the full occupation of a site by juniper trees. The following phases of woodland succession described in Miller et al. (2005) serve as useful benchmarks along this gradient.

Phase I. This early stage of juniper encroachment involves an actively-expanding, open canopy of young trees (usually 40 years old or younger), exhibiting no die-off of lower limbs. The trees are a subordinate component of the plant community. Active recruitment is taking place (tree seedlings in the shrub layer). Grasses, forbs, and shrubs are able to express their full productive potential, apparently uninhibited by competition from juniper. In this stage, little or no observable change in plant community composition or in soil cover and overland flow can be attributed to juniper. Sometimes, however, excessive shrub canopy closure or heavy, long-term grazing use causes perennial grasses and forbs to be sparse or absent. In this phase, a number of treatment options are available for preventing further site degradation.



Phase I of Woodland Succession

Phase II. This mid-successional stage of juniper encroachment also entails an actively expanding canopy of trees now co-dominant in the plant community. In this phase, the maturing juniper may produce berries at moderate to high levels. Depending on several site factors including slope, soil depth, soil texture, and available water capacity of the soil profile, shrubs may die off as the network of shallow juniper roots begins to extend its occupation of the upper soil profile. On moisture-limited sites (those with shallow soils) or on steep slopes with high rates of overland flow (low infiltration rates), shrubs may exhibit stress or die-off as a result of competition. Moderately deep and deep soil sites may retain their shrub, grass, and forb components and exhibit few biotic or abiotic effects. As the site progresses into the later stages of Phase II, shrubs may die off on shallow and moderately deep soils while grasses persist. In the mid to late-stage of succession, fewer treatment options will be effective in preventing further site degradation. Late Phase II and early Phase III constitute the period of transition when biotic and, in many cases, abiotic conditions worsen and the focus of treatment options changes from prevention to restoration and repair.



Phase II of Woodland Succession. Note shrub die-off.

Phase III. At this stage, occupation of the site by juniper is complete, and juniper and its effects dominate the site. Full grow-out of the surface root network concludes; the tree's leader growth has slowed; berry production has declined and tree recruitment is limited. Biotic and abiotic conditions on the site are visibly degraded. Shrub die-off will likely exceed 75 percent. Understory plant production declines, as do species richness and diversity. In the tree interspaces, the loss of understory plant cover exposes bare soil, particularly on drier, harsher sites and those with an effective rooting depth of less than 20 inches. Soil organic matter declines, and raindrop impact promotes physical crusting of the soil surface, reducing infiltration rates and, on sloping sites, overland flow and soil erosion increase. Grasses like Idaho fescue (*Festuca idahoensis*), squirreltail (*Sitanion hystrix* syn. *Elymus elymoides*), bluebunch wheatgrass (*Agropyron spicatum* syn. *Pseudoroegneria spicata*), Thurber needlegrass (*Stipa thurberiana* syn. *Achantherum thurberianum*), and others may persist on moderately deep and deep soils, especially on east- and north-facing slopes or high-elevation terraces and sites with higher precipitation (average annual precipitation over 14 inches). On slopes with southern and western exposures (harsh sites) throughout the range of juniper, the loss of understory vegetation is often most pronounced. Note, however, that under certain soil and site conditions, Idaho fescue may persist and in some cases increase in the northeast quadrant of the canopy of individual trees on some otherwise-harsh sites at mid-elevation. This phenomenon is believed to be a response by Idaho fescue to a favorable microclimate created in the shade cast by the tree.

