



Oregon

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MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Renee Davis, Deputy Director
Eric Williams, Grant Program Manager



**SUBJECT: Agenda Item G: Focused Investments
Approval of 2015-2017 Focused Investment Partnerships (FIP)
Implementation Initiatives and Capacity Building Awards**

I. Introduction

Staff request the Board delegate authority to the Executive Director to execute partnership agreements and grant agreements to implement FIP Implementation initiatives totaling \$12,770,790 and Capacity Building initiatives totaling \$937,369, as recommended by the Board Subcommittee on Focused Investments. A summary of the process leading to this recommendation is provided below.

II. Board Direction on Focused Investments

In June 2013, the OWEB Board approved its Long-Term Investment Strategy Framework with four major areas of investment: Operating Capacity; Open Solicitation; Focused Investments; and Effectiveness Monitoring. Following an extensive public process, the Board established the following priority areas for focused investments at its April 2015 meeting:

- 1) Sagebrush/Sage-Steppe Habitat
- 2) Oregon Closed Lake Basin Wetland Habitat
- 3) Dry-type Forest Habitat
- 4) Oak Woodland and Prairie Habitat
- 5) Coho Habitat and Populations along the Oregon Coast
- 6) Aquatic Habitat for Native Fish Species
- 7) Coastal Estuaries

In July 2015, the Board adopted a spending plan that included \$12.75 million for Focused Investment Implementation awards and \$1 million for Focused Investment Capacity Building awards to support initiatives addressing the Board's adopted priorities.

III. Solicitation Process

In May 2015, staff solicited both Capacity Building and Implementation applications for Focused Investment initiatives.

Capacity: Applicants were required to submit a letter of intent by July 1.

Implementation: Applicants were required to submit a Phase I application by July 1. Implementation applicants were required to formally consult with staff prior to

submitting an application. The Phase I Implementation application addressed the strength of the prospective partnership and required submittal of at least a draft strategic action plan (SAP) consistent with OWEB SAP guidelines.

Capacity Building applications and Phase II Implementation applications were due November 2, 2015.

Capacity: Capacity Building applications addressed one or more of the following: elevating the partnership's current level of performance, developing or enhancing a SAP, or addressing community outreach and engagement relative to the partnership's capacity building efforts.

Implementation: Phase II Implementation applications addressed the proposed work plan and budget to address all or a portion of the initiative's SAP over three biennia.

IV. Application Review

By the July 1, 2015, deadline, OWEB received the following:

Capacity: OWEB received 26 letters of intent to submit Capacity Building applications.

Implementation: OWEB received 12 Phase I Implementation applications, the details of which were presented in the July Board meeting staff report. There were no applications addressing the Coastal Estuaries priority. Phase I Implementation applications were reviewed by expert teams organized around the Board-designated priorities and OWEB staff. The Board Subcommittee on Focused Investments met August 4, 2015, reviewed feedback from experts and staff, and invited nine of the 12 applicants to submit Phase II applications. An invitation to submit was not a requirement to submit a Phase II application, but rather an indication of the subcommittee's assessment of the Phase I application.

By the November 2, 2015, deadline, OWEB received the following:

Capacity: OWEB received 23 Capacity Building applications. All applications were evaluated by expert review teams and OWEB staff. The Capacity Building expert review team included experts on organizational capacity from various organizations throughout the state. The Board Subcommittee on Focused Investments met at a public session on January 12-13, 2016, in Salem to make funding recommendations to the full Board.

Implementation: OWEB received nine Phase II Implementation applications. All applications were evaluated by expert review teams and OWEB staff. Implementation expert review teams were formed around the designated Board priorities. Evaluations were provided to applicants and posted on OWEB's website on January 5, 2015. The Board Subcommittee on Focused Investments met at a public session on January 12-13, 2016 in Salem to make funding recommendations to the full Board.

V. Recommendation

The Board Subcommittee on Focused Investments recommends the Board approve the following investments and delegate authority to the Executive Director to execute partnership agreements and award grants:

Capacity Building: The Board Subcommittee on Focused Investments recommends the Board fund eight FIP Capacity Building applications for a total of \$937,369. Applications recommended for funding are identified by gray shading in Attachment A and the evaluations are provided in Attachment B. Staff propose that \$20,790 of the unspent Capacity Building funds be used to cover the additional Implementation grant needs.

Implementation: The Board Subcommittee on Focused Investments recommends the Board fund six FIP Implementation applications for a total of \$12,770,790. Applications recommended for funding are shown in Attachment C and the evaluations are provided in Attachment D.

Attachments

- A. FIP Capacity Building Subcommittee Funding Recommendations
- B. FIP Capacity Building Evaluations
- C. FIP Implementation Subcommittee Funding Recommendations
- D. FIP Implementation Evaluations

2015-2017 FIP Capacity Building Applications
Focused Investment Subcommittee Funding Recommendation

Project Number	Applicant	Project Name	OWEB Request	Recommended Award Amount
216-8300-12524	Siuslaw Watershed Council	Siuslaw Coho Partnership	\$86,020	\$86,020
216-8300-12539	Confed Tribes Warm Springs	John Day Basin Partnership	\$149,613	\$149,613
216-8300-12525	South Coast WC	Wild Rivers Coast Estuaries *	\$150,000	\$144,106
216-8300-12526	Rogue Basin Coordinating Council	Rogue Basin Partnership*	\$147,483	\$144,483
216-8300-12533	Clackamas River Basin Council	Clackamas Partnership	\$137,696	\$137,696
216-8300-12518	The Nature Conservancy	Oregon Central Coast Estuary Collaborative	\$42,777	\$42,777
216-8300-12519	Grande Ronde Model WS Program	Wallowa Fish Habitat Restoration Partnership	\$83,490	\$83,490
216-8300-12534	Partnership for the Umpqua Rivers	Umpqua Basin Partnership*	\$149,734	\$149,184
216-8300-12538	Lake County Umbrella WC	Warner Basin Aquatic Habitat Partnership	\$41,250	\$0
216-8300-12528	North Coast WS Assn	Lower Columbia Chum Recovery Partnership	\$82,500	\$0
216-8300-12531	MidCoast WC	Central Coast Coho Collaborative	\$150,000	\$0
216-8300-12529	Upper Nehalem WC	Nehalem Coho Strategic Partnership	\$64,350	\$0
216-8300-12527	Wasco SWCD	Wasco County Oak Woodland Partnership	\$29,946	\$0
216-8300-12540	North Fork John Day WC	Upper North Fork John Day Partnership	\$150,000	\$0
216-8300-12521	Greenbelt Land Trust	Willamette Valley Oak-Prairie Cooperative	\$86,483	\$0
216-8300-12535	Klamath Lake Forest Health Partnership	Klamath-Lake Forest Health Partnership	\$149,516	\$0
216-8300-12520	Klamath Bird Observatory	Klamath Siskiyou Oak Network	\$110,059	\$0
216-8300-12522	Malheur WC	N. Malheur Watershed Resource Partnership	\$95,700	\$0
216-8300-12523	Central Oregon Intergovt Council	The Upper Crooked River Watershed WG	\$145,805	\$0
216-8300-12537	Tillamook Estuaries Partnership	North Coast Collaborative Riparian Restoration Strategy	\$75,341	\$0
216-8300-12530	Ducks Unlimited - Chris Colson	Flood-Irrigated Floodplain and Lake Habitat in Lake County	\$95,468	\$0
216-8300-12532	Placeholder	Partnership for Coho Habitat Restoration on Family Forests and Farms	\$143,000	\$0
216-8300-12536	Klamath SWCD	Klamath Watershed Health Team	\$107,425	\$0
Total FIP Capacity Building Request			\$2,473,656	
Total FIP Capacity Building Application Recommended by Staff to Focused Investment Subcommittee				\$937,369

*Funding reduced

FIP Capacity Building Application Review Summary

OVERVIEW

Project #: 216-8300-12518

OWEB Region: Region 1

Partnership Name: Oregon Central Coast Estuary Collaborative

Requested Amount: \$42,777

Board Priorities Addressed:

Aquatic Habitat for Native Fish Species

Coastal Estuaries in Oregon

Coho Habitat and Populations along the Oregon Coast

Intent of Capacity-Building Funding:

Elevate the partnership's current level of performance.

Enhance an existing strategic action plan.

Address community engagement and outreach relative to the partnership's capacity-building efforts.

Applicant's Summary:

The Oregon Central Coast Estuary Collaborative is a network of estuary conservation and restoration practitioners collaborating to improve the health and resilience of estuaries on Oregon's Central Coast. Our Core Partners for this capacity-building application are: The Nature Conservancy, Confederated Tribes of Siletz Indians, Estuary Technical Group of the Institute for Applied Ecology, MidCoast Watersheds Council, Nestucca-Neskowin-Sand Lake Watersheds Council, Salmon Drift Cr. Watershed Council, Siuslaw Watershed Council, The Wetlands Conservancy, Tillamook Estuaries Partnership, and U.S. Fish & Wildlife Service Restoration Programs.

Our long-term goal is protecting and restoring ecologically functional estuaries on the central Oregon Coast. We will use capacity-building funding to complete our strategic action plan, identify a scope of work suitable for a FIP proposal, identify funding for that work, conduct outreach necessary for that work, and develop organizational documents. Funds will be used to help pay for facilitation, travel, and participation by non-profit "Core Groups."

Completion of our strategic plan and outreach will result in coordinated actions among our partners leading to improved ecological health for Oregon's central coast estuaries. Over half of major estuaries in Oregon are located in our area; improving these estuaries will provide significant benefit to OWEB's Coastal Estuaries priority.

REVIEW SUMMARY

Strengths

- The project appears to have been thoughtfully developed.
- The partnership is utilizing a science-driven results chain analysis for the development of its strategic action plan, which is a very reputable process.
- The application provides a good discussion of how the core partnership came to be and a Partnership Charter has been developed.
- Applicant has the in-house resources and expertise to provide facilitation services.

- This is a modest request and a completed SAP would likely lead to future project implementation.
- Partners have quickly shown their ability to collaborate and have not waited for a capacity building grant to begin their work.

Weaknesses

- Partnership challenges were not clearly described in the application.
- Crafting a scope of work for a FIP implementation application is an ineligible expense for a capacity building grant. Only facilitator and partner costs directly related to this proposal would be eligible for reimbursement under this application.
- The application did not clearly describe how success would be evaluated.

Issues of Concern:

- None

OWEB Staff Overall Evaluation:

Readiness of the partnership: High

Likelihood of successful project completion: Medium

OWEB Staff Priority Ranking: 7

Board Subcommittee Recommendation: Fund **Amount:** \$42,777

FIP Capacity Building Application Review Summary

OVERVIEW

Project #: 216-8300-12519

OWEB Region: Region 5

Partnership Name: Wallowa Fish Habitat Restoration Partnership

Requested Amount: \$83,490

Board Priority Addressed:

Aquatic Habitat for Native Fish Species

Intent of Capacity-Building Funding:

Elevate the partnership's current level of performance.

Enhance an existing strategic action plan.

Address community engagement and outreach relative to the partnership's capacity-building efforts.

Applicant's Summary:

Core partners are Grande Ronde Model Watershed, Wallowa County Natural Resources Advisory Committee, Oregon Department of Fish & Wildlife, Nez Perce Tribe, The Freshwater Trust, US Forest Service and Wallowa Resources. Building the Atlas is an inclusive process and additional partners will be added should there be interest and if opportunity presents itself.

The Partnership will develop the Restoration Atlas, a strategic action plan to prioritize, vet and implement habitat restoration projects designed to maximize biological benefits identified in existing data and by expert local knowledge in the Wallowa and Imnaha River subbasins.

Capacity building funds will be used to secure the services of a qualified consultant, who will in turn facilitate the Atlas development process, produce technical documents and high level mapping products.

Capacity building funds will lead to focused restoration actions that address the habitat requirements of native aquatic species, with emphasis on Chinook salmon, steelhead, and bull trout in the Wallowa and Imnaha subbasins. Each restoration action collectively identified and prioritized according to score in the Atlas, will result in relevant and quantifiable benefit to identified fish species.

REVIEW SUMMARY

Strengths:

- The application is very focused on the proposed outcome (Atlas, a strategic action plan), with detailed budget description.
- The budget request is relatively modest for a strategic action plan that can be utilized by a broad partnership. The budget includes good match.
- Long-standing partnership seeking to replicate similar efforts in the upper Grande Ronde that will provide additional focus for the partners. There is considerable evidence provided that the Atlas will be developed and utilized.
- There appears to be a lot of momentum generated in this basin, and there are unique opportunities to bring restoration funding to implement actions identified in the Atlas.

Weaknesses:

- The application is weak on describing the challenges the partnership faces.
- The application could have better described the integrated nature of the partnership and how developing the Atlas would benefit the partnership.
- While it is acknowledged that the partners have done this before, it should be noted that a lot rests on the facilitation, technical writing, and mapping skills of the contractors to develop a tool that will be effectively used by the partners.

Issues of Concern:

- None

OWEB staff Overall Evaluation:

Readiness of the partnership: Medium

Likelihood of successful project completion: High

OWEB Staff Priority Ranking: 8

Board Subcommittee Recommendation: Fund **Amount:** \$83,490

FIP Capacity Building Application Review Summary

OVERVIEW

Project #: 216-8300-12520

OWEB Region: Region 2

Partnership Name: Klamath Siskiyou Oak Network (KSON)

Requested Amount: \$110,059

Board Priority Addressed:
Oak Woodland and Prairie Habitat

Intent of Capacity-Building Funding:

Elevate the partnership's current level of performance.

Produce a strategic action plan.

Address community engagement and outreach relative to the partnership's capacity-building efforts.

Applicant's Summary:

The partnership includes Klamath Bird Observatory (KBO), Resources Conservation Service (NRCS), the Bureau of Land Management (BLM), the US Forest Service (USFS), the US Fish and Wildlife Service (USFWS) Partners for Fish and Wildlife Program, Lomakatsi Restoration Project (LRP), and The Nature Conservancy (TNC). Through KSON, these agencies and organizations have formed a high-performing partnership with a proven track record of partnership building, landowner engagement, on-the-ground restoration, monitoring, and adaptive management focused exclusively on oak conservation and restoration.

Ecological outcomes identified by KSON include improved function, resiliency, connectivity, and habitat value of oak woodland and chaparral habitats in southern Oregon. These ecological outcomes align directly with the OWEB Focused Investment Partnership Priority Oak Woodland and Prairie Habitat.

KSON partners seek to develop a Strategic Action Plan which will strengthen our ability to achieve ecological outcomes significant to the state, outcomes which are critical to reverse declining trends of oak associated plants and wildlife. The Strategic Action Plan will serve as a road map for oak woodland and chaparral restoration actions, and will establish short, medium, and long term goals to achieve our ecological outcomes over the entire southern Oregon landscape.

REVIEW SUMMARY

Strengths

- The partnership seems to have a history of working together.
- The group has a recently signed MOU.
- The application provided a candid discussion of lessons learned.
- The application clearly described the need for a SAP.

Weaknesses

- The deliverables were poorly described in the application.

- In the application it appeared that KBO is doing all of the work, the roles of the other partners were not clearly described. The application did not make a clear case that KBO was the right partner to lead the SAP development.
- The application proposes to expand to work in the Umpqua basin; however no local partners have yet been identified. Seems unlikely to be successful with a two-year grant.
- Answer to question 10A is vague; unclear what capacities will be targeted.
- Outreach deliverables were unclear; only outreach costs directly related to this capacity building grant are eligible.

Issues of Concern:

- None

OWEB staff Overall Evaluation:

Readiness of the partnership: Low

Likelihood of successful project completion: Low

OWEB Staff Priority Ranking: 17

Board Subcommittee Summary: Unclear why the applicant proposes to expend to the Umpqua Basin. There seems to be enough work for the partnership in the Rogue Basin.

Board Subcommittee Recommendation: Do not fund

Amount: \$0

FIP Capacity Building Application Review Summary

OVERVIEW

Project #: 216-8300-12521

OWEB Region: Region 3

Partnership Name: Willamette Valley Oak-Prairie Cooperative

Requested Amount: \$86,483

Board Priority Addressed:
Oak Woodland and Prairie Habitat

Intent of Capacity-Building Funding:

Elevate the partnership's current level of performance.

Produce a strategic action plan.

Address community engagement and outreach relative to the partnership's capacity-building efforts.

Applicant's Summary:

The Willamette Valley Oak and Prairie Cooperative (Cooperative) has representatives from the lower, middle and upper sub-regions of the Willamette Valley. The partners in the Cooperative (Appendix 1) have extensive experience in planning and implementing on-the-ground work to protect, restore and maintain native oak and prairie habitats in the Willamette Valley. The Cooperative proposes to develop a two-tiered Willamette Valley Oak-Prairie Strategic Action Plan and formalize an organizational partnership structure to implement goals, objectives, and tasks identified in the Strategic Action Plan. Tier one is a Willamette Valley-wide strategy. Tier 2 is three sub-regional plans developed by existing regional partnerships. This approach produces synergy while maintaining regional identity and flexibility. The Cooperative is applying for funds from OWEB's Focused Investment Partnership Capacity-Building funds to assist in the development of the Strategic Action Plan and strengthen the Cooperative's operational structure. Once the Strategic Action Plan is completed, the Cooperative intends to apply for Focused Investment Partnership Implementation Funding. The overarching goal of the Cooperative is to protect, restore, and maintain a functional, resilient network of oak and prairie habitats in the Willamette Valley through a coordinated and strategic approach that leverages resources, focuses on priority project areas and species, and produces substantial ecological returns.

REVIEW SUMMARY

Strengths

- The "local working group" partnerships have strong histories with successful planning and implementation efforts.
- The regional steering committee seems like a good concept.
- The partners are integrating work from existing assessments.

Weaknesses

- Not much detail on community engagement.
- The partnership and proposed geographic scale of work is new; do all these partners need to be involved? Who are the core partners? Are the right partners being engaged?
- The application is unclear on how the capacity building grant will significantly change or increase the different groups' oak habitat work. The added value of the regional approach is not clearly articulated.

- Intertwine is key to the success of the partnership, but its level of involvement is unclear.
- General concern about the size of the geography, the many partners, and the “loose” partnership.

Issues of Concern:

- None

OWEB staff Overall Evaluation:

Readiness of the partnership: Low

Likelihood of successful project completion: Medium

OWEB Staff Priority Ranking: 15

Board Subcommittee Recommendation: Do not fund

Amount: \$0

FIP Capacity Building Application Review Summary

OVERVIEW

Project #: 216-8300-12522

OWEB Region: Region 5

Partnership Name: Northern Malheur Watershed Resource Partnership

Requested Amount: \$95,700

Board Priorities Addressed:

Aquatic Habitat for Native Fish Species

Sagebrush/Sage-steppe Habitat

Intent of Capacity-Building Funding:

Elevate the partnership's current level of performance.

Produce a strategic action plan.

Address community engagement and outreach relative to the partnership's capacity-building efforts.

Applicant's Summary:

The Northern Malheur Watershed Resource Partnership consists of nine core entities. Among them are the Malheur Watershed Council, the Vale Oregon Bureau of Land Management, the Malheur County Soil and Water Conservation District, the Ontario office of the Natural Resources Conservation Service, the USFWS, ODFW, the Burns Paiute Tribe Natural Resources Division, Trout Unlimited, and DEQ.

The partnership seeks to improve rangeland and riparian health to benefit ODFW identified "species of interest" in the Sagebrush/Sage-steppe Habitat. We will hire a contractor to be the Partnership Coordinator to conduct an outreach program, write a strategic action plan, develop a pilot restoration project, and coordinate a natural resource inventory. Our partnership's goals align with OWEB's Sagebrush/Sage-steppe Habitat Focused Investment Priorities and Aquatic Habitat for Native Fish Species. We intend to improve rangeland health and riparian areas to benefit habitat for the sage-grouse, mule deer, antelope, bull trout and red band trout.

REVIEW SUMMARY

Strengths:

- Good discussion of conducting landowner outreach along with the development of a strategic action plan. The application is clear that landowner support is vital for effective restoration action to take place.
- The application identifies challenges to the partnership, and it is clear that this is an effort to bring the necessary entities into the partnership.
- Individually, the partners have a good track record at implementing projects.

Weaknesses:

- The application stated that the partners intended to use capacity building funding to elevate the partnership's current level of performance, yet there was no description in question 10A as to how this would occur.
- While a number of partners are participating in the initiative, the roles and responsibilities of the various partners and how the partnership operates are not well described.

- A significant part of the budget is dedicated to developing a pilot project/natural resources inventory. While a pilot project can develop interest and momentum for a partnership, it is not clear why these elements are necessary for a successful capacity building initiative.
- There are a number of local issues (e.g., sage grouse and bull trout) where this relatively new partnership can play an important role. However, specific issues and how the partnership is seeking to address them are not well described in the application.

Issues of Concern:

- None

OWEB staff Overall Evaluation:

Readiness of the partnership: Low

Likelihood of successful project completion: Medium

OWEB Staff Priority Ranking: 18

Board Subcommittee Recommendation: Do not fund

Amount: \$0

FIP Capacity Building Application Review Summary

OVERVIEW

Project #: 216-8300-12523

OWEB Region: Region 4

Partnership Name: The Upper Crooked River Watershed Working Group (UCRW-WG)

Requested Amount: \$145,805

Board Priority Addressed:

Dry-type Forest Habitat

Intent of Capacity-Building Funding:

Elevate the partnership's current level of performance.

Produce a strategic action plan.

Address community engagement and outreach relative to the partnership's capacity-building efforts.

Applicant's Summary:

Core partners of the Upper Crooked River Watershed Working Group (UCRW-WG) include the Ochoco Forest Restoration Collaborative, Crooked River Watershed Council, United States Forest Service, Bureau of Land Management and Oregon Wild. UCRW-WG will develop a detailed strategic action plan to coordinate dry forest restoration across jurisdictional boundaries within the Upper Crooked River Watershed, a region prioritize by a multitude of Federal, State and local conservation strategies— including the Oregon Conservation Strategy and the Region 6 Terrestrial Restoration and Conservation Strategy. Ecological outcomes include increase diverse in forest structure, age, and composition, increased resilience to high-severity, stand-replacing wildfire, and decreased risk of insect infestation and disease.

During plan development, UCRW-WG will gather data on the current conditions and restoration needs on private lands and integrate these findings with data from existing plans. We will strengthen our partnership and increase member diversity, outreaching to private landowners and other key stakeholders through one-on-one meetings, kitchen table conversations and public meetings. We will also formalize our working agreements and governance structure. Deliverables include formal working agreements, increased membership diversity, a Private Lands Resource Assessment, a prioritization process and a detailed strategic action plan.

REVIEW SUMMARY

Strengths:

- This is a thoughtful application with clear deliverables, metrics, and a good discussion of bringing in others to discuss lessons learned.
- Good breakout on what contracted services are requested.
- The partnership is looking to synthesize existing plans to produce a strategic action plan.
- The right partners for this type of project in this area are involved in the initiative.

Weaknesses:

- The application stated that the partners intended to use capacity building funding to elevate the partnership's current level of performance, yet there was no description in question 10A as to how this would occur.

- It is unclear which roles each partner will play in the partnership, and it was not well described how the partners have worked together in the past.
- The USFS is listed as offering significant in-kind support, but there are concerns that there may not be sufficient capacity at the district level.
- The application states that FIP funding will be used for data collection to assemble a Private Land Resource Assessment. This is an ineligible cost for FIP capacity building applications (see page 3 of the instructions).
- It would be beneficial to better explain how many landowners are in the focus area, average acreage involved, and how outreach will be conducted accordingly.

Issues of Concern:

- None

OWEB staff Overall Evaluation:

Readiness of the partnership: Medium

Likelihood of successful project completion: Low

OWEB Staff Priority Ranking: 19

Board Subcommittee Recommendation: Do not fund

Amount: \$0

FIP Capacity Building Application Review Summary

OVERVIEW

Project #: 216-8300-12524

OWEB Region: Region 1

Partnership Name: Siuslaw Coho Partnership

Requested Amount: \$86,020

Board Priority Addressed:

Coho Habitat and Populations Along the Oregon Coast

Intent of Capacity-Building Funding:

Elevate the partnership's current level of performance.

Produce a strategic action plan.

Address community engagement and outreach relative to the partnership's capacity-building efforts.

Applicant's Summary:

The Siuslaw Coho Partnership (SCP) core partners are: BLM-Eugene District, Confederated Tribes of the Coos, Lower Umpqua, and Siuslaw Indians, USFS-Siuslaw NF, Siuslaw SWCD, and the Siuslaw Watershed Council. SCP partners possess the qualifications and experience to achieve the SCP's desired ecological outcomes. The desired ecological outcomes of the partnership include increased quantity and quality of instream complexity and rearing and spawning habitats, increased stream connectivity to floodplains, improved riparian habitat, and improvement in water quality characteristics identified as limiting factors for Siuslaw, Siltcoos, and Tahkenitch coho populations.

Capacity-Building funds will be utilized for partners' labor, travel, materials, equipment, contracted services, and grant administration efforts, leading to achievement of the following Capacity-Building goals: Develop governance documents for the partnership; Develop and execute strategic action plans for the Siltcoos and Tahkenitch Coho Populations that include strategic outreach plans; Develop a flexible mapping tool to be used in multiple phases of Capacity-Building and Implementation. Funds will be spent in support of SCP Capacity-Building efforts, leading to efficient and effective implementation efforts that result in achievement of the SCP's desired ecological outcomes. Ecological outcomes are in alignment with the OWEB FIP for Coho Habitat and Populations along the Oregon Coast and key limiting factors for the Siltcoos and Tahkenitch coho populations.

REVIEW SUMMARY

Strengths

- The description of the strategic action plan development process is well aligned with the Coho Business Plan process, which the partnership is already involved with.
- The ecological need for the SAP is well stated.
- This is a strong local partnership, which has a history of working well together.
- The proposed streamlining data and uniting various outreach efforts across partners will lead to a more effective partnership and future coordinated restoration implementation.
- Good performance indicators for what the partnership hopes to achieve.
- The discussion of challenges and solutions was well done.

- Budget costs seem reasonable for the deliverables presented in the application, particularly in light of the rigorous strategic action plan development approach used in the Coho Business Plan framework.

Weaknesses

- The application did not clearly describe how success would be evaluated.
- The budget and proposed activities do not clearly align; as a result, it is difficult to determine the amount of money being put toward each deliverable.
- Unclear whether the proposed the development of a strategic mapping tool and outreach plan are directly tied to the development of the strategic action plan or other capacity building efforts.
- Concern that much of the anticipated staff time in the budget will come from the Siuslaw Watershed Council. Reviewers wanted to know which staff they plan to put toward the effort and what their expertise is in terms of developing a strategic action plan that will follow the scientifically rigorous process used for the Coho Business Plan process.

Issues of Concern:

- None

OWEB staff Overall Evaluation:

Readiness of the partnership: High

Likelihood of successful project completion: High

OWEB Staff Priority Ranking: 1

Board Subcommittee Recommendation: Fund

Amount: \$86,020

FIP Capacity Building Application Review Summary

OVERVIEW

Project #: 216-8300-12525

OWEB Region: Region 2

Partnership Name: Wild Rivers Coast Estuaries

Requested Amount: \$150,000

Board Priorities Addressed:

Coastal Estuaries in Oregon

Coho Habitat and Populations along the Oregon Coast

Intent of Capacity-Building Funding:

Elevate the partnership's current level of performance.

Produce a strategic action plan.

Address community engagement and outreach relative to the partnership's capacity-building efforts.

Applicant's Summary:

The core partners include: Curry SWCD; South Coast Watershed Council; Lower Rogue Watershed Council; The Nature Conservancy. We will produce a Strategic Plan written to OWEB FIP specifications, produce a Partnership Operations Manual, broaden our partnership base, streamline our data management system, recruit additional funding partners, and begin developing outreach and education program tools with which to promote this estuary initiative for a quarter of the Oregon Coast. Estuaries have been identified as a priority by OWEB, the Oregon Conservation Strategy, The Nature Conservancy, and the Independent Multi-disciplinary Science Team. There are over 20 existing plans for restoring South Coast estuaries.

The proposed ecological outcomes include restoration of estuarine processes and functions, in 10 South Coast estuaries, over a 10 year time-frame. Actions include:

- Measurable water quality improvements to benefit all species (terrestrial, aquatic and avian) including the nearshore environment where estuaries extend off shore.
- Restored salmon refugia, including:
 - Habitat and Floodplain Connectivity
 - Improved Fish Passage
 - Increased off-channel rearing habitat
- Conservation, restoration, or enhancement of freshwater and tidal wetlands.
- Promoting working landscapes and securing estuarine habitats.

REVIEW SUMMARY

Strengths

- This is a long-standing successful partnership that has recently recruited new partners.
- The work accomplished on the south coast is impressive and reviewers felt that the entities individually, and as a partnership, have the ability to tackle the work presented in this application.
- The partnership is taking a holistic approach and has addressed challenges and opportunities going forward.

- Good outreach discussion on the challenges of outreach to critical partner sectors, such as the ports and other estuary-based businesses.
- Strong budget with good detail.

Weaknesses

- The answers to Questions 6 and 7 primarily address the partnership's needs around applying for a FIP implementation initiative. Capacity building funds are not intended for this purpose.
- The information on hiring an outside person was generic with no specific scope of work.
- The geography seems large – there are a lot of estuaries in this geography, future implementation will be challenging

Issues of Concern:

- None

OWEB staff Overall Evaluation:

Readiness of the partnership: High

Likelihood of successful project completion: High

OWEB Staff Priority Ranking: 3

Board Subcommittee Recommendation: Fund

Amount: \$144,106

FIP Capacity Building Application Review Summary

OVERVIEW

Project #: 216-8300-12526

OWEB Region: Region 2

Partnership Name: Rogue Basin Partnership

Requested Amount: \$147,483

Board Priorities Addressed:

Aquatic Habitat for Native Fish Species

Coho Habitat and Populations along the Oregon Coast

Intent of Capacity-Building Funding:

Elevate the partnership's current level of performance.

Enhance an existing strategic action plan.

Address community engagement and outreach relative to the partnership's capacity-building efforts.

Applicant's Summary:

The Rogue Basin Partnership (RBP) was created to serve as the backbone organization for restoration in the Rogue Basin, and to facilitate collective impact and Rogue Restoration Action Plan delivery. RBP consists of 15 member organizations and over a dozen partner organizations, including agency personnel serving as technical advisors (RBP participant list attached). As part of the Action Plan, RBP members identified several landscape-level critical habitat types in the region, the species they support, the strategies needed to conserve or restore the habitats, and the feasibility of delivering restoration strategies to these habitats over the next decade. The long-term ecological outcome of restoring the Rogue will be clean water at sufficient volumes throughout the year to sustain aquatic and human life and maintain healthy, interconnected, native riparian/floodplain forests and grassland and upland forest habitats dominated by native species. A cornerstone of the Action Plan is to preserve and improve conditions to support focal native fish, which is directly aligned with the OWEB FIP priorities of "Aquatic Habitat for Native Fish Species" and "Coho Habitat and Populations along the Coast." Capacity-Building funds would support RBP in its role as facilitator of Action Plan delivery and would provide capacity for RBP members to coordinate the Action Plan's Implementation Framework.

REVIEW SUMMARY

Strengths

- The proposed deliverables are well thought-out and achievable.
- The measures of success were clearly described.
- The partners involved are strong, and appear to be committed to the process and a collaborative approach.
- The working group approach seems as though it will lead to a focused process, allow greater engagement from partners, and lead to a higher likelihood of success.
- The proposed development of a funding strategy shows the partners are thinking about long-term stability and future SAP implementation.

Weaknesses

- The application proposes to hire two staff, an executive director and a fiscal administrator; the qualifications of these staff are unclear.

- The viability of the executive director position is unclear over the long-term (i.e., how the partnership will continue the position after two years).
- The hours and associated cost for the executive director seem high; only costs for the position directly related to this proposal would be eligible for reimbursement under this application.
- The application clearly described the partnerships past accomplishments; however, there was not much description of what would happen in the future after the completion of the SAP.

Issues of Concern:

- The \$6,000 for events and trainings needs to be clarified to ensure all costs are eligible expenses under a Capacity-Building grant.

OWEB staff Overall Evaluation:

Readiness of the partnership: High

Likelihood of successful project completion: High

OWEB Staff Priority Ranking: 4

Board Subcommittee Summary: This is a big request to fund an executive director; will they be doing all of the work? Staff clarified it is not all for the Rogue Basin Partnership executive director, some will go towards paying for partnership participation in with work groups, which will be developing the details of the SAP.

Board Subcommittee Recommendation: Fund

Amount: \$144,483

FIP Capacity Building Application Review Summary

OVERVIEW

Project #: 216-8300-12527

OWEB Region: Region 4

Partnership Name: Wasco County Oak Woodland Partnership

Requested Amount: \$29,946

Board Priorities Addressed:

Dry-type Forest Habitat

Oak Woodland and Prairie Habitat

Intent of Capacity-Building Funding:

Produce a strategic action plan.

Applicant's Summary:

The Wasco County Oak Woodland Partnership's core partners include Wasco County SWCD, USDA Natural Resources Conservation Service, Oregon Department of Forestry, Oregon Department of Fish & Wildlife and the U.S. Forest Service. Ecological outcomes for the partnership include reduction of pest and disease vectors, encroachment by competing plant species such as conifers, connectivity with dry transition zones, implementing management practices once addressed by fire, protection of healthy sites and enhance merit of sites that are declining and educating landowners on oak woodland management practices and the ecological importance of oak woodlands. The partnership will develop a new strategic plan to arrive at a clear and concise plan targeting oak habitat management and recovery in the East Cascades of Wasco County. Funds will be used to engage a facilitator who will organize and coordinate meetings, type minutes, maintain contact lists and group correspondence, disseminate information, conduct outreach to landowners, create and maintain a webpage for public information and outreach, and to provide administrative support for the creation of the written strategic implementation plan. The strategic plan will address the key limiting factors (habitat loss, fragmentation and degradation) of Oregon white oak (*Quercus garryana*) with a focus on ecosystem function and processes.

REVIEW SUMMARY

Strengths

- Some of the partners have been working together for a long-time.
- This is an inexpensive request that builds off the partners resources.
- The right partners are involved to address the challenges and develop solutions.

Weaknesses

- The need for the capacity building application was not clearly described.
- Not a very big geographic scale.
- Unclear how long the larger partnership has existed and what it has accomplished to date.
- Not much money for a facilitator, can the deliverables be achieved with the requested funding?
- Details on the application deliverables were vague.
- The outreach narrative is very weak; however, there is some discussion of incorporating landowner outreach in to the SAP process.

Issues of Concern:

- None

OWEB staff Overall Evaluation:

Readiness of the partnership: Medium

Likelihood of successful project completion: Low

OWEB Staff Priority Ranking: 13

Board Subcommittee Recommendation: Do not fund

Amount: \$0

FIP Capacity Building Application Review Summary

OVERVIEW

Project #: 216-8300-12528

OWEB Region: Region 1

Partnership Name: Lower Columbia Chum Recovery Partnership

Requested Amount: \$82,500

Board Priority Addressed:

Aquatic Habitat for Native Fish Species

Intent of Capacity-Building Funding:

Elevate the partnership's current level of performance.

Produce a strategic action plan.

Address community engagement and outreach relative to the partnership's capacity-building efforts.

Applicant's Summary:

The Lower Columbia Chum Recovery Partnership includes the Lower Columbia River Watershed Council, the North Coast Watershed Association, Lewis and Clark National Historical Park, the Lower Columbia Estuary Partnership, the Columbia River Estuary Study Taskforce, and the Oregon Department of Fish and Wildlife. Ecological outputs from restoration actions include:

- Decreased erosion along stream banks and in tributaries
- Improved gravel retention
- Increased channel complexity
- Improved floodplain connectivity
- Increased abundance of spawning habitat
- Anthropogenic migration barriers addressed

Ecological outcomes from restoration actions include:

- Increased distribution of chum salmon spawning in response to habitat restoration
- Increased egg-to-fry survival of chum salmon in response to improved habitat quality

Our partnership seeks capacity-building funds to (1) create a Strategic Action Plan detailing locations and projects required to address Chum Salmon limiting factors, (2) attract new partners to our partnership, and (3) engage with landowners through public meetings to garner support (and potentially identify additional projects) for restoration projects.

Columbia River Chum Salmon are a federally-listed species and their recovery is a top priority of the state. Increased capacity will allow our partnership to prioritize and pursue restoration actions toward the objective of reaching delisting criteria for Chum Salmon in the Coastal Stratum.

REVIEW SUMMARY

Strengths

- The application clearly defines the partnership and the deliverables.
- The application clearly describes the need for a strategic action plan focused on chum.
- The partnership appears to be strong and to be the right partners for successful SAP completion and future restoration implementation.

- Reviewers have confidence the SAP will be completed as proposed.
- Budget is mostly reasonable.

Weaknesses

- The overall application outcomes seem overly ambitious.
- Much of the proposed work is already occurring; unclear to some reviewers of the value added from a capacity building grant.
- Big investment in outreach, but unclear how it will inform the development of the strategic action plan.
- Rather than printing and binding three action plans, the partnership is encouraged to post the final plan on an appropriate website and to consider developing a companion 2–4-page summary of the plan with a link to the website plan.

Issues of Concern:

- None

OWEB staff Overall Evaluation:

Readiness of the partnership: Medium

Likelihood of successful project completion: Medium

OWEB Staff Priority Ranking: 10

Board Subcommittee Recommendation: Do not fund

Amount: \$0

FIP Capacity Building Application Review Summary

OVERVIEW

Project #: 216-8300-12529

OWEB Region: Region 1

Partnership Name: Nehalem Coho Strategic Partnership

Requested Amount: \$64,350

Board Priorities Addressed:

Aquatic Habitat for Native Fish Species

Coastal Estuaries in Oregon

Coho Habitat and Populations along the Oregon Coast

Intent of Capacity-Building Funding:

Elevate the partnership's current level of performance.

Enhance an existing strategic action plan.

Address community engagement and outreach relative to the partnership's capacity-building efforts.

Applicant's Summary:

The Nehalem Coho Strategic Partnership (NCSP) seeks to secure a Nehalem Focused Investment Partnership (NFIP) to efficiently and effectively restore 120 miles of essential salmon habitat in cooperation with stakeholders, state and federal agencies and technical advisors, in 8 years. Area of focus is in high priority 6th field sub-basins identified during the "pilot" Nehalem Strategic Action Plan (NSAP) process (complete spring 2016).

Capacity support assures the development of a Memorandum of Understanding (MOU) for Nehalem FIP implementation. A professional facilitator will collaborate with council staff and partners to develop a FIP scope of work that delivers a completed OWEB Nehalem FIP application.

Success of the capacity building effort includes support for targeted outreach to raise stakeholder and community awareness of the need for Coho population recovery. Outreach shares NSAP findings emphasizing the need for protection/restoration of ecosystem/watershed processes that support Coho population recovery. Emphasis includes species life history stages, habitat needs, limiting factors and FIP solutions.

Capacity building utilizes council staff to secure adequate in-kind and funding support for Nehalem FIP implementation.

NFIP aligns with OWEB's focused investment priorities for Coho Habitat and Populations along the Oregon Coast, Aquatic Habitat for Native Fish Species and Coastal Estuaries in Oregon.

REVIEW SUMMARY

Strengths

- The proposal aligns well with the Coho Business Plan process, which the partnership is already involved with.
- The outreach to industrial landowners is great.

Weaknesses

- It was unclear from the application who are the partners involved. Was it the same group currently involved in the Coho Business Planning process?
- There seems to be a need to elevate the partnership, however this work was not well described in the application.
- The timeline was vague; reviewers expressed concern that not enough time has been factored in to search for and contract with a facilitator.
- Community engagement and measures of success discussion were weak.
- Most of the funding goes to support the two watershed council coordinator positions; it was unclear how this funding will support the proposed deliverables and capacity building of the partnership.

Issues of Concern:

- Not all of the proposed activities are directly tied to the capacity building grant offering. For example, general outreach or developing a FIP application, are not eligible activities under a capacity building grant.

OWEB staff Overall Evaluation:

Readiness of the partnership: Low

Likelihood of successful project completion: Medium

OWEB Staff Priority Ranking: 12

Board Subcommittee Recommendation: Do not fund

Amount: \$0

FIP Capacity Building Application Review Summary

OVERVIEW

Project #: 216-8300-12530

OWEB Region: Region 4

Partnership Name: Flood-irrigated Floodplain and Lake Habitat in Lake County

Requested Amount: \$95,468

Board Priorities Addressed:

Aquatic Habitat for Native Fish Species
Oregon Closed Lakes Basin Wetland Habitats
Sagebrush/Sage-steppe Habitat

Intent of Capacity-Building Funding:

Elevate the partnership's current level of performance.
Produce a strategic action plan.
Address community engagement and outreach relative to the partnership's capacity-building efforts.

Applicant's Summary:

The core partnership of this FIP Capacity-Building application consists of the Lake County Umbrella Watershed Council, Lake County Soil and Water Conservation District, Ducks Unlimited, and Intermountain West Joint Venture. This partnership represents a decade of collaborative outreach, planning, and conservation delivery of stream and floodplain habitat and function.

The partnership is committed to achieving the singular ecological outcome of increasing climate resiliency and water-use efficiency of Lake County's historic floodplains for the benefit of migratory birds, native fish, and agricultural resiliency.

The partnership will contract with a research firm to facilitate a series of landowner meetings, generate a subsequent survey, and then summarize the analysis of the survey results into a report. The socioeconomic factors identified in the report will inform the development of a Strategic Action Plan that will identify the restoration actions necessary to maintain flood-irrigated habitat on the landscape.

As water becomes increasingly limited, flood-irrigated habitats risk being lost as operators convert to alternative agricultural practices. Understanding operator motivations, operation limitations, and long-term planning, and identifying commonalities among landowners of varying operational scales, assets and liabilities is necessary to implement restoration actions aimed at improving water-use efficiencies in these highly managed systems at a watershed scale.

REVIEW SUMMARY

Strengths:

- This is an interesting proposal, with a unique approach towards community engagement and an understanding of how climate change and water use impacts the floodplain.
- Gathering the information that the partners are proposing might lead to new restoration possibilities in the area and beyond.
- A two-day symposium is proposed for the politically sensitive issues surrounding Lake Abert where common ground amongst the stakeholders may be achieved.

Weaknesses:

- The application states that a significant amount of capacity building funding will be used for social research that in turn would help develop a strategic action plan. While the research is intriguing, this is an ineligible cost (see page 3 of the instructions).
- The roles and responsibilities of the partners are unclear.
- The application would benefit from a better discussion as why maintaining flood-irrigation (which some see as inefficient) is the default solution to floodplain habitat restoration.

Issues of Concern:

- The application objectives do not seem like a good fit for the FIP capacity building application. The partners are encouraged to look at Oregon Water Resources Department Place Based Planning Grant Program as that may be a better fit for what is proposed.

OWEB staff Overall Evaluation:

Readiness of the partnership: Low

Likelihood of successful project completion: Low

OWEB Staff Priority Ranking: 21

Board Subcommittee Recommendation: Do not fund

Amount: \$0

FIP Capacity Building Application Review Summary

OVERVIEW

Project #: 216-8300-12531

OWEB Region: Region 1

Partnership Name: Central Coast Coho Collaborative

Requested Amount: \$150,000

Board Priorities Addressed:

Aquatic Habitat for Native Fish Species

Coastal Estuaries in Oregon

Coho Habitat and Populations along the Oregon Coast

Intent of Capacity-Building Funding:

Elevate the partnership's current level of performance.

Produce a strategic action plan.

Applicant's Summary:

The Central Coast Coho Collaborative is comprised of the MidCoast Watersheds Council, Lincoln Soil and Water Conservation District, Confederated Tribes of the Siletz Indians, Salmon Drift Creek Watershed Council, Pacific States Marine Fisheries Commission, and The Wetlands Conservancy. The capacity building funds will allow core partners to solidify current ad hoc partnerships focused on broad sense recovery of Coho Salmon and the ecosystem functions that support them on the Central Oregon Coast. Specifically, the key partners seek to work through a planning process to create population specific strategic action plans by updating existing assessments with new information, including restoration techniques to buffer populations against predicted climate change. In the strategic plan development, partners will undertake a data synthesis/update, geomorphic and physical habitat analysis, and density dependence analysis overlaid with predicted climate change models. Capacity building will support: 1) partner time to develop a memorandum of understanding and participate in a process to develop the strategic action plans; 2) local core team time and travel as necessary; 3) professional services for the partnership to seek outside expertise to facilitate the process, such as providing necessary background work, taking notes, and drafting the plan; and 4) technical assistance with assessment and modeling.

REVIEW SUMMARY

Strengths

- The goals and deliverables are clearly described as are the challenges and solutions.
- The thoughtful discussion on climate change was appreciated.
- The SAP appears to be based on the Coho Business Plan format, which is very technical in nature, and includes collection of new data and analysis of existing data.
- Partners have worked together for many years with several sharing office space, accounting, monitoring and technical teams.

Weaknesses

- No community engagement is planned for developing/enhancing the strategic action plan; this might impact the long-term success of the SAP and the capacity building effort.
- The application is lacking details on partnership staffing and governance.
- The budget lacks details on the justification of costs; the lump sum for the facilitator is unexplained and seems expensive.
- The potential involvement of the Wild Salmon Center is not well explained.
- One of the challenges in this area is engaging private landowners, which is not addressed as a problem in this proposal.

Issues of Concern:

- The Alsea Basin, which is not covered in the partnership, is a major river system within this landscape. Without the inclusion of this basin it is unclear how the SAP and future implementation efforts can be successful.

OWEB staff Overall Evaluation:

Readiness of the partnership: Low

Likelihood of successful project completion: Medium

OWEB Staff Priority Ranking: 11

Board Subcommittee Summary: The Board Subcommittee discussed why the application received a low ranking for readiness of the partnership. Staff explained that there was concern that the Alsea Basin was missing from the proposal and it was unclear how that portion of the watershed would be incorporated into future implementation.

Board Subcommittee Recommendation: Do not fund

Amount: \$0

FIP Capacity Building Application Review Summary

OVERVIEW

Project #: 216-8300-12532

OWEB Region: Region 1

Partnership Name: Partnership for Coho Habitat Restoration on Family Forests and Farms

Requested Amount: \$143,000

Board Priority Addressed:

Coho Habitat and Populations Along the Oregon Coast

Intent of Capacity-Building Funding:

Elevate the partnership's current level of performance.

Produce a strategic action plan.

Address community engagement and outreach relative to the partnership's capacity-building efforts.

Applicant's Summary:

The core partners are Family Forests of Oregon, Oregon Small Woodlands Association, Oregon Tree Farm System, and the Oregon Board of Forestry's Committee for Family Forestlands, Oregon Department of Forestry, and the Oregon Forest Resources Institute.

This project will achieve improvements in coho habitat by achieving the following ecological outcomes:

- Increasing stream complexity;
- Improving riparian condition;
- Improving fish passage and road condition;
- Improving water quality.

This partnership and eventual project implementation will improve coho habitat, by targeting investments in areas of high intrinsic potential. Family forests and farms dominate the ownership (81%) along reaches with high intrinsic potential, with an estimated 45% of this area either non-forested or recently logged (Burnett et al. 2007). In Oregon's Coast Range, many landowners own a mix of forestland and pastureland. This partnership focuses effort on high intrinsic potential regardless of land use. Funds will be used to expand and enhance the existing partnership, target outreach to landowners, and develop a strategic action plan.

“Habitat management and improvement is key to protecting and enhancing coastal coho; much of the most important coho habitat is on private land; habitat improvement on private land is most likely to occur through incentive-based cooperative partnerships with landowners” (Oregon Coastal Coho Conservation Plan 2007).

REVIEW SUMMARY

Strengths

- This is an excellent group of partners.
- The ecological objectives are appropriate, but the partners need to focus their efforts.
- The proposed activities are appropriate to achieve the desired outcomes.

- The partners have a history of working together, though there are no formal agreements related this specific proposal.

Weaknesses

- The application appears to be for landowner outreach for future project implementation, which is not an eligible activity under the FIP Capacity-Building grant.
- The geographic scope of the proposal is huge; no map was included, which made it difficult to understand if there was any focus.
- Key partners are missing from the proposal to successfully overcome the described challenges.

Issues of Concern:

- The reviewers were very supportive of the concept of this proposal. However, many of the specific activities described are not eligible for this grant type. The reviewers hope the partnership will outreach to additional partners, such as watershed councils and soil and water conservation districts, and continue to pursue project funding and implementation through other funding routes.

OWEB staff Overall Evaluation:

Readiness of the partnership: Low

Likelihood of successful project completion: Low

OWEB Staff Priority Ranking: 22

Board Subcommittee Recommendation: Do not fund

Amount: \$0

FIP Capacity Building Application Review Summary

OVERVIEW

Project #: 216-8300-12533

OWEB Region: Region 3

Partnership Name: Clackamas Partnership

Requested Amount: \$137,696

Board Priority Addressed:

Aquatic Habitat for Native Fish Species

Intent of Capacity-Building Funding:

Elevate the partnership's current level of performance.

Produce a strategic action plan.

Enhance an existing strategic action plan.

Address community engagement and outreach relative to the partnership's capacity-building efforts.

Applicant's Summary:

The Clackamas Partnership include Clackamas Soil & Water Conservation District, Clackamas Co. Water Environment Services, Clackamas Co. Parks, Clackamas River Basin Council, Metro, Oregon Dept. of Fish & Wildlife, Oregon Depart. of Environmental Quality, North Clackamas Parks & Recreation District, Portland General Electric, and US Forest Service, joined by Greater Oregon City, North Clackamas Urban, and Johnson Creek watershed councils, all of whom have extensive experience planning and completing restoration activities in partnership with one another with resulting benefits to the Clackamas populations of listed salmon and steelhead ("Clackamas Populations").

Ecological outcomes identified by the partnership will address limiting factors of degraded water quality, aquatic and riparian habitat, migratory corridor connectivity and fish passage, and invasive species in priority areas presenting habitat for all life stages of Clackamas Populations and in the Clackamas River Basin.

The Clackamas Partnership will develop an enhanced strategic action plan for Clackamas Populations informed by the Lower Columbia River Conservation & Recovery Plan, as the baseline plan, which is organized by strata/population and incorporates other plan strategies. The partnership's strategic action plan will prioritize actions for the recovery of listed species and establish a process for working together to address the OWEB Board-approved Focused Investment Priority for Aquatic Habitat for Native Fish Species.

REVIEW SUMMARY

Strengths

- The partners have a track record of collaboration.
- The outcomes were clearly identified.
- The partners described how they have been working together on various types of projects, but they made a good case for the added-value the Capacity-Building funding will provide.
- A draft MOU was included with the application, demonstrating the partnership is serious and moving forward.

Weaknesses

- It appeared to be more agencies focused, rather than landowner focused. Reviewers were not sure how landowners would be engaged in the future.
- Reviewers recommend that rather than printing copies of the entire plan, the applicant post the plan on an appropriate website, develop a 2-4-page summary of the plan with a link to the website plan, and print copies of the summary as an outreach tool.

Issues of Concern:

- Reviewers were unclear why two facilitators are needed; it seems like an excessive expense. Reviewers request OWEB staff follow-up with the applicant to determine the need and if the facilitator costs could be reduced.

OWEB staff Overall Evaluation:

Readiness of the partnership: High

Likelihood of successful project completion: High

OWEB Staff Priority Ranking: 5

Board Subcommittee Recommendation: Fund

Amount: \$137,696

FIP Capacity Building Application Review Summary

OVERVIEW

Project #: 216-8300-12534

OWEB Region: Region 2

Partnership Name: Umpqua Basin Partnership

Requested Amount: \$ 149,734

Board Priorities Addressed:

Aquatic Habitat for Native Fish Species

Coastal Estuaries in Oregon

Coho Habitat and Populations along the Oregon Coast

Dry-type Forest Habitat

Oak Woodland and Prairie Habitat

Intent of Capacity-Building Funding:

Elevate the partnership's current level of performance.

Produce a strategic action plan.

Address community engagement and outreach relative to the partnership's capacity-building efforts.

Applicant's Summary:

The Umpqua Basin Partnership consists of several nonprofit, private and agency organizations. The following are the core partners: Partnership for the Umpqua Rivers, Elk Creek Watershed Council, Smith River Watershed Council, Cow Creek Band of Umpqua Tribe of Indians, South Umpqua Rural Community Partnership, Roseburg/Coos Bay/Medford BLM, Umpqua National Forest, Oregon Department of Fish and Wildlife and National Marine Fisheries Service. All of the organizations have extensive experience operating in the Umpqua Basin and possess the necessary resources and commitment to implement holistic watershed restoration activities in future.

The ecological outcomes identified by the Partnership include efforts that maintain or enhance holistic watershed processes that benefit: Aquatic habitat for all native species, Coho salmon population recovery, estuarine habitats for native species, Upland habitats for native species and Riparian habitats. -The Partnership seeks to develop an action plan for the entire basin that takes into account the long term ecological recovery of the system for native species. Funds will be used to hire a facilitator and technical contractor to complete the action plan. Additionally, funds will be utilized to pay for nonprofit and key partner staff time, action plan printing and mileage.

The development of the strategic action plan will identify and prioritized restoration efforts throughout the entire basin in a holistic approach, maximizing ecological benefits to the resource. This will allow for contiguous restoration across the checker boarded landscape of the Umpqua.

REVIEW SUMMARY

Strengths

- Seems like a strong committed partnership with a strong leader in the form of the applicant.
- The individual groups have been working together in some fashion for a long time and have been involved in the community.

- The applicant has made noteworthy adaptations to its oversight, governance, management, relationships with others, and role in the watershed.
- The partnership is actively searching for other sources of funding.
- The group has researched other successful groups who have developed a SAP and build partnership capacity. If funded they plan on using a similar process and established facilitator.

Weaknesses

- This is a new partnership with no formal agreements yet in place.
- The basin is large with many partners and moving parts, it is hard to predict the long-term success of this effort.
- Elevating the partnership seems key to its long-term success. The tasks associated with this activity were poorly described.
- Because the larger partnership is relatively new, reviewers wondered whether it will be able to achieve success over the long run.
- The cost for action plan and map printing (\$2,500) seems excessive; the partnership is encouraged to post the final plan on an appropriate website and to consider developing a companion 2–4-page summary of the plan with a link to the website plan.

Issues of Concern:

- None

OWEB staff Overall Evaluation:

Readiness of the partnership: High

Likelihood of successful project completion: Medium

OWEB Staff Priority Ranking: 9

Board Subcommittee Recommendation: Fund

Amount: \$149,184

FIP Capacity Building Application Review Summary

OVERVIEW

Project #: 216-8300-12535

OWEB Region: Region 4

Partnership Name: Klamath-Lake Forest Health Partnership (KLFHP)

Requested Amount: \$149,516

Board Priority Addressed:

Dry-type Forest Habitat

Intent of Capacity-Building Funding:

Elevate the partnership's current level of performance.

Enhance an existing strategic action plan.

Address community engagement and outreach relative to the partnership's capacity-building efforts.

Applicant's Summary:

The Klamath-Lake Forest Health Partnership (KLFHP) core partners are: ODF, Fremont-Winema National Forests, NRCS, Lake and Klamath County Soil and Water Conservation Districts, Klamath Watershed Partnership, Lake County Umbrella Watershed Council and OSU) These organizations have extensive experience in restoration projects and outreach in Klamath and/or Lake Counties.

The ecological outcome identified by KLFHP is to increase the health, sustainability and productivity of dry-type conifer forests in Klamath and Lake Counties by implementing restoration treatments in high-priority watersheds. KLFHP will enhance the 2009-2011 Strategic Action Plan for Lake and Klamath Counties based on the components identified by OWEB. The KLFHP has identified the Greater Lobert Focus Area as the priority within the two counties. KLFHP will conduct landowner and community outreach and education; develop a broad communication network among agencies, landowners and other stakeholders; and identify site-specific projects with willing landowners in the Greater Lobert Focus Area. The FIP priorities identify dry-type forests to address habitat conservation and restoration at the landscape scale. Completion of the strategic action plan will allow implementation of treatments leading to ecological outputs on a greater scale than is likely without coordination by KLFHP.

REVIEW SUMMARY

Strengths:

- The partnership has all the right entities and is seeking to reinvigorate dry-type forest restoration in the area.
- The proposal calls out roles and responsibilities of the partners. The integration with the Klamath Watershed Partnership is intriguing, and believed to be a good move for the partnership.
- This is a partnership that quietly is able to get work accomplished on the ground.

Weaknesses:

- The discussion of outcomes and metrics of success is lacking in detail.
- The project timeline is compressed (e.g., completing the strategic action plan in spring, 2016).

- There is concern that the application proposes to build the capacity of one organization (Klamath Lake Forest Health Partnership) and not the group of partners that are collaborating in this effort. This is evident in the budget, where the bulk of the request is to pay for a single executive director.
- The application states that an existing strategic action plan is not utilized, and there is a concern that there is no mechanism for how an enhancement or revision of this plan would actually be used by the partners.

Issues of Concern:

- It should also be noted that the request for liability insurance (\$2,800) should not be in addition to the 10% grant administration rate as that is an example of an administrative cost.
- While the need for coordination is evident, there doesn't seem to be a plan to sustain the executive director position. In fact, it's mentioned in the application that a staff position has ebbed and flowed with available grant funding. As an alternative, the partnership could have requested funding for facilitation/enhancing the strategic action plan with some funding set aside for partner contributions to meeting and developing the plan. This could be done at a fraction of the cost and produce a plan that has partner buy-in that would be better utilized than the existing document.

OWEB staff Overall Evaluation:

Readiness of the partnership: Low

Likelihood of successful project completion: Low

OWEB Staff Priority Ranking: 16

Board Subcommittee Recommendation: Do not fund

Amount: \$0

FIP Capacity Building Application Review Summary

OVERVIEW

Project #: 216-8300-12536

OWEB Region: Region 4

Partnership Name: Klamath Watershed Health Team

Requested Amount: \$107,425

Board Priorities Addressed:

Dry-type Forest Habitat

Sagebrush/Sage-steppe Habitat

Intent of Capacity-Building Funding:

Elevate the partnership's current level of performance.

Produce a strategic action plan.

Address community engagement and outreach relative to the partnership's capacity-building efforts.

Applicant's Summary:

The Klamath Watershed Health Team is made up of various stakeholders coming together with the same goal in mind; restore watershed health in the Klamath Basin to restore flows to springs, streams, and rivers to increase and improve water quality and quantity to benefit fish and wildlife and a way of life in the Klamath Basin. The core group includes Klamath Soil and Water Conservation District, the Natural Resource Conservation Service, and the Ore-Cal Resource Conservation and Development Area Council. Our mission is to put water back in our rivers, streams, and wetlands and providing sustainable water to our agricultural communities.

REVIEW SUMMARY

Strengths:

- The partnership identifies landowner outreach as an important first step in conducting effective watershed restoration.
- With reduced agency capacity, the partners have understandably come together to collaborate.

Weaknesses:

- The application does not provide clear information for all the application questions, at times the application is difficult to follow.
- The roles of the partners in the initiative are unclear. Nearly all of the tasks described by the partners in each budget line item are identical regardless if OWEB funding is requested or if it is a match contribution.
- Details of how a strategic action plan will be produced are lacking and not at all described in the initiative timeline.

Issues of Concern:

- The budget is almost entirely for contracted services, although much of what is included (~\$58,000) appears to better fit within salaries, wages, and benefits as it is for Klamath SWCD staff (the applicant).

- The application proposed to work in two OWEB Board Priority Area, Dry-type Forest Habitat and Sagebrush/Sage-steppe Habitat; however the geographic area of the application does not fall within the Sagebrush/Sage-steppe Habitat priority area.

OWEB staff Overall Evaluation:

Readiness of the partnership: Low

Likelihood of successful project completion: Low

OWEB Staff Priority Ranking: 23

Board Subcommittee Recommendation: Do not fund

Amount: \$0

FIP Capacity Building Application Review Summary

OVERVIEW

Project #: 216-8300-12537

OWEB Region: Region 1

Partnership Name: North Coast Collaborative- Riparian Restoration Strategy

Requested Amount: \$75,341

Board Priorities Addressed:

Aquatic Habitat for Native Fish Species

Coho Habitat and Populations along the Oregon Coast

Intent of Capacity-Building Funding:

Elevate the partnership's current level of performance.

Produce a strategic action plan.

Address community engagement and outreach relative to the partnership's capacity-building efforts.

Applicant's Summary:

The North Coast Collaborative (NCC) consists of three partner types: State and Federal agencies, watershed councils, and non-profit organizations. The councils include the Nestucca-Neskowin-Sand Lake, Tillamook Bay, Lower and Upper Nehalem, Necanicum, and the North Coast Watershed Association. The agencies include the Oregon Departments of: Forestry, Environmental Quality, Fish and Wildlife, and Agriculture; the US Fish and Wildlife Service, Tillamook County Soil and Water Conservation District, and the US Forest Service. The nonprofits include the Tillamook Estuaries Partnership, North Coast Land Conservancy, and Friends of Netarts Bay - Watershed, Estuaries, Beach and Sea (WEBS). The NCC has identified an area from the Necanicum to Neskowin watersheds as its project area. This also includes Nehalem, Tillamook Bay, Sand Lake, Netarts, and Nestucca watersheds. The NCC is focused on addressing two Focused Investment Priorities: Coho Habitat and Populations along the Oregon Coast and Aquatic Habitat for Native Fish Species. As a result, the NCC anticipates two long term ecological outcomes: improved water quality and aquatic habitats for native fish species, including Oregon Coast Coho. The first step in this effort is the development of a Strategic Action Plan and the NCC is seeking capacity-building funds to accomplish this.

REVIEW SUMMARY

Strengths

- Partnership appears to envision a reasonable process for completing a strategic action plan in terms of partner engagement, limited outreach, and data collection.
- Strong local partnership, which has a history of working well together, though no formal partnership agreements have been developed.
- Budget seems reasonable.

Weaknesses

- Geography is quite large and possibly unmanageable in a possible, future focused investment.
- The answer to Question 6 did not include a discussion of *why* a strategic action plan is needed, not just why it will be challenging to develop one.
- The budget requests funding for outreach, but the application had no discussion of it and how it will complement the development of a strategic action plan.

- No discussion of how governance documents will be developed.
- Partnership and geographic scope of the proposal felt very broad and reviewers were unsure of the likelihood of success.

Issues of Concern:

- The proposal did not address how the SAP would prioritize projects, development of a prioritization process seems like the biggest challenge this group would face in the development of the SAP.

OWEB staff Overall Evaluation:

Readiness of the partnership: Low

Likelihood of successful project completion: Low

OWEB Staff Priority Ranking: 20

Board Subcommittee Recommendation: Do not fund

Amount: \$0

FIP Capacity Building Application Review Summary

OVERVIEW

Project #: 216-8300-12538

OWEB Region: Region 4

Partnership Name: Warner Basin Aquatic Habitat Partnership

Requested Amount: \$41,250

Board Priorities Addressed:

Aquatic Habitat for Native Fish Species
Oregon Closed Lakes Basin Wetland Habitats

Intent of Capacity-Building Funding:

Elevate the partnership's current level of performance.
Produce a strategic action plan.
Address community engagement and outreach relative to the partnership's capacity-building efforts.

Applicant's Summary:

The Warner Basin Aquatic Habitat Partnership consists of five core partners- Lake County Umbrella Watershed Council, Lake County Soil and Water Conservation District, Oregon Department of Fish and Wildlife, US Bureau of Land Management, US Fish and Wildlife Service, plus the recent addition of a secondary partner, US Forest Service. All of these partners have extensive experience operating in the Warner Basin and possess the resources necessary to implement programmatic conservation work in the future.

The ecological outcomes identified by the partnership include conserving and improving aquatic habitat by restoring habitat connectivity (passage) for native fish species in the Warner Basin, including the Warner Sucker, an ESA listed threatened species and the Warner Lakes redband trout (State of Oregon and BLM sensitive species). Our objective of developing a Strategic Action Plan is to provide guidance for all associated fish passage and screening activities in the Warner Basin that will improve aquatic habitat connectivity, and ultimately reach recovery goals for Warner sucker. The partnership will develop a Strategic Action Plan outlining priority areas and projects within the Basin. Capacity Building funds will be used to hire a contractor to organize meetings with the stakeholder groups and to write the strategic action plan. After the strategic action plan is completed, the partnership intends to apply for Focused Investment Partnership Implementation funding.

REVIEW SUMMARY

Strengths:

- Budget is modest and brings good leverage.
- The partners are well respected in the area and are doing meaningful work with landowners. This is informal at times, but works well in an area where a lot depends on building and maintaining relationships with landowners.
- The partners describe a good understanding of the challenges faced by the partnership.
- The partners have focused on one key issue in the basin, habitat connectivity.
- The process for developing the strategic action plan is well articulated, and identifies clear deliverables. It is obvious that the partners have spent time thinking about their needs.

Weaknesses:

- The budget contains lump sums for the facilitator/writer and it is not clear if this amount of funding will be sufficient.
- The application stated that the partners intended to use capacity building funding to elevate the partnership's current level of performance, yet there was no description in question 10A as to how this would occur.
- The development of a database is mentioned in the timeline, but not discussed elsewhere in the application.
- The project timeline seems rushed, it may take longer than anticipated to secure the right facilitator and develop an effective strategic action plan. The partners are encouraged to not rush this process in order to complete before the 2017-2019 FIP Implementation cycle.

Issues of Concern:

- None

OWEB staff Overall Evaluation:

Readiness of the partnership: High

Likelihood of successful project completion: High

OWEB Staff Priority Ranking: 6

Board Subcommittee Summary: The Board Subcommittee (Subcommittee) discussed two aspects of the proposal, 1) the scope for the partnership's Strategic Action Plan (SAP), which appears to be focused on one limiting factor, fish barrier removal and 2) the informal nature of the partnership. The Subcommittee was concerned that completing a SAP focused on only one limiting factor did not meet the intent of the Focused Investment Partnership Capacity Building funding. The application seems like it would be a better fit for a technical assistance application through the Open Solicitation program. Staff clarified that the current partnership structure has been informal, but the partnership does propose to develop organizational documents with the FIP capacity building grant funds.

Board Subcommittee Recommendation: Do not fund

Amount: \$0

FIP Capacity Building Application Review Summary

OVERVIEW

Project #: 216-8300-12539

OWEB Region: Region 6

Partnership Name: John Day Basin Partnership

Requested Amount: \$149,613

Board Priority Addressed:

Aquatic Habitat for Native Fish Species

Intent of Capacity-Building Funding:

Enhance an existing strategic action plan.

Applicant's Summary:

The John Day Basin Partnership (JDBP) formed to accelerate the pace, scale, and impact of watershed restoration across the basin. Core partners that sit on the Steering Committee include the Warm Springs Tribe, Wheeler SWCD, South Fork John Day Watershed Council, The Freshwater Trust, Oregon Department of Fish and Wildlife, and Bureau of Land Management. In total, 20 organizations signed a Memorandum of Understanding (MOU) as formal partners, and these groups represent the major basin restoration interests and possess the experience to execute programmatic restoration. Ecological outcomes include increased cold water and summer base flows in the system, and fully-functioning ecosystem processes that support a long-term trend of increasing populations of wild summer steelhead, spring chinook, bull trout, and other important native fish. Funds will be used to finish a Strategic Action Plan (SAP) that focuses on the watersheds that are most ripe for restoration and the actions that are most necessary to achieve outcomes. Funds will support contracting to select priority areas, design a monitoring scheme, and estimate costs and support partner capacity to compile data, set localized goals, and finalize the plan. With a complete plan, the JDBP will pursue FIP Implementation funding. Executing the plan will enable restoration in areas listed as highest and second highest priority by OWEB FIP for Aquatic Habitat for Native Fish.

REVIEW SUMMARY

Strengths

- This is a very well written application and all the right partners are involved.
- The application indicates a mature partnership with broad support, including a Partnership Operations Manual and Partnership MOU.
- The engagement of the Confederated Tribes of the Warm Springs Reservation is excellent, and the Tribes contribute substantially to this partnership.
- The process described for enhancing the SAP is well thought-out and should lead to a high quality SAP.
- The application and partnership are clearly focused; the partnership and SAP will concentrate on juvenile steelhead habitat restoration work.

Weaknesses

- It was unclear how this application relates to 216-8300-12540, Upper North Fork John Day Partnership.

- Output #7, estimate the cost and funding needs for an OWEB FIP, seems excessive and needs further clarification.

Issues of Concern:

- None

OWEB staff Overall Evaluation:

Readiness of the partnership: High

Likelihood of successful project completion: High

OWEB Staff Priority Ranking: 2

Board Subcommittee Recommendation: Fund

Amount: \$149,613

FIP Capacity Building Application Review Summary

OVERVIEW

Project #: 216-8300-12540

OWEB Region: Region 6

Partnership Name: Upper North Fork John Day Partnership

Requested Amount: \$150,000

Board Priorities Addressed:

Aquatic Habitat for Native Fish Species

Dry-type Forest Habitat

Intent of Capacity-Building Funding:

Elevate the partnership's current level of performance.

Enhance an existing strategic action plan.

Address community engagement and outreach relative to the partnership's capacity-building efforts.

Applicant's Summary:

The Upper North Fork John Day Partnership (UNFJDP), working together since 2011, consists of highly effective core partners who steward the sensitive headwaters in the northern branches of the John Day River. The group includes public, private, and tribal core partners: Bureau of Reclamation, Confederated Tribes of the Umatilla Indian Reservation, Desolation Creek LLC, Malheur National Forest, North Fork John Day Watershed Council, Oregon Department of Fish and Wildlife, Umatilla National Forest, and the Wallowa Whitman National Forest. Additional partners will be added through Capacity Building. Together, these partners deliver ecologic outcomes, focused on the critical headwaters complex, particularly emphasizing juvenile steelhead, in alignment with OWEB's Aquatics priority. A secondary focus is the Dry Forest priority. The ecologic outcomes will: increase abundance of juvenile steelhead by 20%; replenish groundwater recharge and restore base flows for improved hydrography; measurably increase public understanding of restoration processes; share reports; and support Partners in their collective implementation of restoration actions aligned with area recovery plans. In order to achieve those ecologic outcomes, the Partnership seeks to build capacity, partially with funds sourced from OWEB, to:

1. Contract locally-based group Facilitation,
2. Hire one "Restoration Coordinator," and
3. Enhance the existing Draft Action Plan to form a final document.

REVIEW SUMMARY

Strengths

- The application was well written with clearly described outcomes and deliverables.
- The partnership is focusing on a very important area of the John Day Basin and a SAP would lead to future project implementation.
- The right partners are involved and seem committed to the process.

Weaknesses

- The hours and associated cost for the restoration coordinator and mileage (almost \$30,000) seem high; only costs for the position directly related to this proposal would be eligible for reimbursement under this application.
- The application did not clearly explain why the restoration coordinator could not be housed with other watershed council staff; the separate office location is not centrally located and could lead to communication challenges.
- The viability of the restoration coordinator position over the long term is unclear (i.e., how the position will be supported).
- It is unclear how this project and the restoration coordinator position fit into the overall plan for the watershed council.

Issues of Concern:

- Some proposed activities are ineligible under a FIP capacity building grant, including landowner recruitment for future restoration, design of future restoration projects, and collection of new data.
- The projects relationship to application 216-8300-12539, John Day Basin Partnership, was unclear.

OWEB staff Overall Evaluation:

Readiness of the partnership: Medium

Likelihood of successful project completion: Medium

OWEB Staff Priority Ranking: 14

Board Subcommittee Recommendation: Do not fund

Amount: \$0

**2015-2017 FIP Implementation Applications
Focused Investment Subcommittee Funding Recommendation**

Rank	Partnership	Requested amount	Percent reduction	Reduction	Subcommittee recommended amount
1	The Deschutes Partnership	\$ 4,000,000	10%	\$ 400,000	\$ 3,600,000
2	Willamette Mainstem Anchor Habitat Working Group	\$ 2,550,000	7.8%	\$ 198,900	\$ 2,351,100
3	Harney Basin Wetlands Initiative	\$ 1,780,000	7%	\$ 124,600	\$ 1,655,400
4	Oregon Model to Protect Sage Grouse, All Counties	\$ 2,171,000	7%	\$ 151,970	\$ 2,019,030
5	Ashland Forest All-lands Restoration	\$ 1,660,000	7%	\$ 116,200	\$ 1,543,800
6	Upper Grande Ronde Initiative	\$ 1,722,000	7%	\$ 120,540	\$ 1,601,460
7	Sandy River Basin Partners	\$ 2,810,000	N/A	\$ -	\$ -
8	Millicoma Forks Coastal Coho Restoration Partnership	\$ 1,780,000	N/A	\$ -	\$ -
9	McKenzie Collaborative	\$ 1,850,000	N/A	\$ -	\$ -
	Total	\$ 20,323,000		\$ 1,112,210	\$ 12,770,790
				FIP Implementation line item	12,750,000
				Difference	\$ 20,790

FIP Implementation Application Review Summary

1. Name of Focused Investment Partnership Initiative:

The Deschutes Partnership

2. Initiative connection to Board-identified Priority(ies):

Aquatic Habitat for Native Fish Species

3. Budget Overview:

Funding Period	OWEB Funding Request	Estimated Leverage
Biennium 1	\$4,000,000	\$5,750,000
Biennium 2	\$4,000,000	\$6,566,000
Biennium 3	\$4,000,000	\$3,887,000
Total	\$12,000,000	\$16,203,000

4. Phase II Application Strengths:

- The proposed geography is reasonable, the partnership is experienced, and the application is well developed.
- Outcomes align with those proposed in the strategic plan and support the Board priority.
- The core partnership entities are capable of implementing and monitoring. The entities have the requisite expertise to deliver the proposed actions and strategies.
- The partnership has good momentum and the proposal would build on their previous work.
- Reviewers believe that many of the restoration actions presented should have long-term benefits (i.e., permanently conserved instream water and restoration on properties that have permanent protections).
- Passage at Opal Springs, which is included in this proposal, is critical to reintroduction success in the basin.
- Reviewers believe that accomplishment of the actions and strategies in this application can “move the dial” toward the achievement of the desired ecological outcomes.

5. Phase II Application Weaknesses:

- Although the application itself was well written, the proposal lacked sufficient detail in the work plan and budget in order for the reviewers to fully consider the proposed activities.
- In the initiative work plan, the outputs and metrics for water conserved instream, measured as cubic feet per second (cfs), do not align with the stated targets listed as proposed actions, nor do they align with the target of 18.9 cfs stated in the application.
- The discussion of streamflow conservation and the associated cfs targets had Whychus Creek and Crooked River watersheds lumped together, making it difficult to ascertain what would be accomplished in each watershed.
- Reviewers questioned why habitat restoration was not identified as an initiative action to be implemented in the Lower Crooked River.
- The baseline conditions discussion (page 10) was not well developed. The limiting factors, baseline and needs were not tied directly to a planning document such that the statements could be verified. Reviewers could not understand what the overall needs are (i.e., streamflow) and how much progress this proposed initiative will make toward achieving those targets.
- Reviewers believe that outreach needs to be targeted to landowners in critical sections of the basin rather than the proposed general community outreach.
- The requested budget of this partnership continues to be the highest of all the proposals. Although it is acknowledged that the partnership’s strategies and actions are ambitious and expensive to

implement, reviewers noted that the proposed work plan focused exclusively on reintroduction of ESA-listed species, the success of which is dependent upon actions beyond the partnership's control, and lacked details regarding benefits to other native species.

6. Phase II Application Issues of Concern (not weaknesses, but issues where additional information or discussion may be needed):

- Reviewers continue to have questions regarding the likelihood of successful reintroduction in relationship to impacts from outside of the initiative's proposed geography, particularly issues related to the operation and management of the Pelton Round Butte Hydroelectric.
- Reviewers continue to have questions related to reintroduction efforts within the proposed geography and how the partnership is adapting its strategies to remain current.
- Monitoring and evaluation metrics need improvement. Reviewers would like to see a discussion in the application of how fish are responding in terms of density and abundance, and reviewers believe these types of metrics should be included in the partnership's monitoring strategies.
- Reviewers would appreciate a more robust discussion of other species that use the system and that could benefit from these proposed actions (i.e., bull trout).

7. Rating of Phase II Application: HIGH (–)

8. Summary of Phase I Evaluation:

The application was well written, limiting factors are well identified, and the strategies and actions proposed are generally accurate to address those limiting factors. The partnership has a long and positive track record of developing sound project technical design, implementing restoration programs, and using effective monitoring strategies. Primary critiques revolved around the lack of specificity in the application for reviewers to adequately understand the likelihood of achieving significant ecological outcomes that can positively impact reintroduction efforts. These questions include but are not limited to: fish return data and how this information influences where restoration and conservation work occurs; federal legislation related to flows in the Crooked River; issues related to the Pelton Round Butte Hydroelectric Complex; and how the partnership's work is strategized and coordinated with the specific reintroduction efforts occurring in the basin.

9. Combined Phase I and Phase II Rating: HIGH (–)

10. Board Subcommittee Discussion

- The reintroduction of anadromous fish in the Upper Deschutes is significant.
- Fish passage at Opal Springs is critical.
- Articulated outcomes were excellent
- Strong partnership and track record.
- Concern over how management at Pelton-Round Butte will impact reintroduction efforts.
- Concern about reducing the budget; Opal Springs should not be impacted.
- Timing is a concern; maintain momentum to prioritize Opal Springs.

11. Board Subcommittee Ranking: 1 of 9

12. Board Subcommittee Recommendation: Fund at a reduced amount of \$3,600,000 for the 2015-2017 biennium.

FIP Implementation Application Review Summary

1. Name of Focused Investment Partnership Initiative:

Upper and Middle Willamette Mainstem Anchor Habitats (Willamette Mainstem Anchor Habitat Working Group)

2. Initiative connection to Board-identified Priority(ies):

Aquatic Habitat for Native Fish Species

3. Budget Overview:

Funding Period	OWEB Funding Request	Estimated Leverage
Biennium 1	\$2,555,000	\$3,860,000
Biennium 2	\$2,430,000	\$2,090,000
Biennium 3	\$2,180,000	\$1,110,000
Total	\$7,160,000	\$7,060,000

4. Phase II Application Strengths:

- Application was well written.
- Strong organizational capacity and partnership; signed agreements; strong letters of support.
- Focus is on the highest priority anchor habitats determined through a Nature Conservancy multi-partner effort.
- Good momentum. Builds on previous work and tests whether an anchor habitat approach can produce measureable results/impact on such a large river system.
- Outcomes align with those proposed in the strategic plan and support the Board priority.
- Strong linkages with other, existing basin efforts.
- Incorporation of the SLICES framework into project identification, prioritization, and success tracking at the river reach scale is a plus.
- Solid multiple species benefits.
- Though west side tributaries may not be a priority, practitioners have done significant work at confluence sites.
- Independent review of their monitoring plan.
- Monitoring section lays out hypotheses, which helped reviewers “connect the dots.”
- Many areas are already in protected status (e.g., state parks).

5. Phase II Application Weaknesses:

- Specific monitoring metrics and outcomes are lacking. There are no baseline metrics, and therefore, a lack of target setting for outputs. Simple metrics, which appear in the action plan, would have strengthened the application discussion.
- Specifics of the work plan deliverables are unclear.
- Fish monitoring is weak; doesn’t appear to be coordinated with ODFW. Doesn’t connect to trends in adult fish monitoring and instead seems to defer to what OSU/UO *might* develop.
- Unclear if working only on protected lands. Are all landowners lined up for the first biennium?
- Outreach is not focused on recruiting new landowners since projects are already in the pipeline. What is the opportunity for new projects that arise to enter the pipeline?

6. Phase II Application Issues of Concern (not weaknesses, but issues where additional information or discussion may be needed):

- Considerable work went into identifying the anchor habitats; a FIP investment would help see this work through. Consequently, there is a compelling need to document along the way what worked/did not work and lessons learned.
- Invasive fish species are a growing problem. Not all side-channel restoration is necessarily a good thing as those restored areas can attract invasive, as well as native fish. The partnership would do well to focus such efforts in cold water refuge sites and work to find other such areas.
- The partnership could consider a strategic focus on one anchor habitat, rather than actions spread across multiple anchor habitats.
- The individual practitioners are strong, but the partnership is relatively new and untested. The partnership is encouraged to deepen its working relationships, add new partners as appropriate over time, and put strategic interests above all. Organizational accountability and strong leadership will be key.
- The “right” funding sources are currently at the table and match is strong; however, work on the Willamette is complex and expensive. The basin is rich in resources and the partnership is encouraged to continue cultivating and developing new, significant funding partnerships and other types of partnerships.
- The partnership would benefit from opening a dialogue with private landowners to develop best approaches for a cohesive outreach strategy.

7. Rating of Phase II Application: HIGH -

8. Summary of Phase I Evaluation: The application outlined reasonable and appropriate measurable ecological outcomes that the partnership will pursue in addressing the Board-approved priority. The strategic action plan was strong, but neglected to identify SMART objectives, which the applicant remedied in Phase 2. On the strength of the Phase 1 application, the partnership was invited to submit a Phase 2 application.

9. Combined Phase I and Phase II Rating: HIGH (-)

10. Board Subcommittee Discussion

- Rich in data, SLICES is excellent; they know what they need to do and where.
- Strong partnership with a solid track record.
- Anchor Habitats as an organizing, prioritizing framework is a plus.
- Concern about how much the “ecological dial” will be turned in such a large geography.
- Appreciates that the partnership is not trying to tackle the entire mainstem, but instead, is focusing on the “necklace” of Anchor Habitats.

11. Board Subcommittee Ranking: 2 of 9

12. Board Subcommittee Recommendation: Fund at a reduced amount of \$2,351,100 for the 2015-2017 biennium

FIP Implementation Application Review Summary

1. **Name of Focused Investment Partnership Initiative:** Harney Basin Wetlands Initiative
2. **Initiative connection to Board-identified Priority(ies):** Oregon Closed Lakes Basin Wetland Habitats
3. **Budget Overview:**

Funding Period	OWEB Funding Request	Estimated Leverage
Biennium 1	\$1,780,000	\$2,580,000
Biennium 2	\$1,970,000	\$2,290,000
Biennium 3	\$2,500,000	\$5,400,000
Total	\$6,250,000	\$10,270,000

4. **Phase II Application Strengths:**

- The scale of the initiative is appropriate with clear linkages to work on federal land (Malheur National Wildlife Refuge).
- Strong community outreach plan.
- The balance of the budget is well structured with initial focus on technical assistance leading to on-the-ground work as the partners gather information and prioritize work.
- The partners have identified the primary threat in the area (carp) and have clearly identified the actions necessary to control carp in a staged manner.
- The attached carp management plan that was requested with the Phase I evaluation highlights and discusses several actions that the partnership may take to address carp control.
- Good discussion of how adaptive management will be utilized for both carp control and enhancing wet meadow habitats.
- Landowner support for working lands easements appears to be high.
- Work plan is well thought out and clearly covers all elements.
- The partnership is diverse and has been working together for several years.
- The partnership is clearly thinking of the ecological, social, and economic outcomes of their initiative.
- Excellent leverage demonstrated, with innovative sources of funding (e.g., revenue from carp harvest).

5. **Phase II Application Weaknesses:**

- The request has increased ~\$750,000 from Phase I to Phase II, yet the acreage identified for wet meadow enhancement has decreased by 3,800 acres.
- A better discussion of why past efforts to control carp (e.g., rotenone treatments) failed would strengthen the application. Particularly lessons learned from these past efforts.
- Securing working lands easements is an important element of the work plan, yet it is not clear who will hold the easements.
- A discussion on accounting for drought in the project area was lacking.
- Installation of piezometers on private land is expensive. Vegetation health would be a preferable surrogate.

6. Phase II Application Issues of Concern (not weaknesses, but issues where additional information or discussion may be needed):

- There is a concern that high levels of methylmercury exist in the Great Basin, and that this may cause neurological problems with migratory birds (particularly shorebirds). Partners should be aware of this issue, and consider working with USGS to monitor methylmercury and potential impacts to birds in the focus area.
- The incentive for irrigators to transition to sprinkler systems versus updating flood-irrigation infrastructure is a challenge that the partnership faces to maintain surrogate wetlands.
- It will be important for partners to prioritize landowners that are utilizing flood irrigation on flat areas near streams.
- It will be important for the partners to contact the Oregon Water Resources Department Watermaster on all irrigation issues.
- This initiative has particularly strong economic linkages with agriculture and tourism. It would be beneficial for the partners to consider studying the economic value of the work proposed to the local community.

7. Rating of Phase II Application: High (-)

8. Summary of Phase I Evaluation: Strengths identified in the Phase I evaluation included a strong partnership with impressive on-the-ground accomplishments, demonstrated strategic thinking with the scope of the initiative, an excellent Strategic Action Plan, and clear momentum to continue complex work. Weaknesses identified in the Phase I evaluation included the difficulties associated with effective long-term carp control, the lack of a third-party conservation easement holder in the focus area, and some concern with the ability to make meaningful change given the nature of complex projects and drought associated with climate change. The partnership was invited by the Board Subcommittee to submit a Phase II application.

9. Combined Phase I and Phase II Rating: High (-)

10. Board Subcommittee Discussion

- Iconic wetland (Malheur) and an extremely important international flyway and waterfowl area. Any investment here will be beneficial.
- Science-based; targeted investments in priority areas.
- Public-private initiative is a plus; it could be a model for socio-economic success.
- Exceptionally strong partnership.
- Concern that the FIP might be premature based on how much is set aside in the budget for technical assistance. Would prefer to see a more “shovel-readiness.”
- Carp removal has been challenging, long-term success for this type of work is uncertain.

11. Board Subcommittee Ranking: 3 of 9

12. Board Subcommittee Recommendation: Fund at a reduced amount of \$1,655,400 for the 2015-2017 biennium.

FIP Implementation Application Review Summary

1. **Name of Focused Investment Partnership Initiative:** Oregon Model to Protect Sage Grouse, All Counties
2. **Initiative connection to Board-identified Priority(ies):** Sagebrush/Sage-steppe Habitat
3. **Budget Overview:**

Funding Period	OWEB Funding Request	Estimated Leverage
Biennium 1	\$2,171,000	\$1,588,500
Biennium 2	\$2,355,250	\$460,000
Biennium 3	\$473,732	\$228,000
Total	\$5,000,000	\$2,276,500

4. Phase II Application Strengths:

- The geographic focus is improved from the Phase I application, and aligns with sage-grouse core areas and ongoing planning efforts.
- Work on private land will augment restoration efforts in adjacent federal land and address threats at a landscape scale.
- Good partnerships with relevant agencies and demonstrated landowner support in focus areas.
- The goals, objectives, actions, and deliverables are clearly defined in the initiative. Proposed restoration actions are appropriate for sagebrush/sage-steppe restoration efforts. The goals are ambitious, but believed to be achievable.
- Partners appear to have the organizational capacity to deliver in the narrowed focus areas.
- Diverse set of match funding is almost entirely secured and the partners have a proven track record at obtaining outside sources of funding.

5. Phase II Application Weaknesses:

- While the geographic focus is narrowed, the application would benefit from a better explanation as to why these areas were selected by the partnership as opposed to other priority areas in Lake, Harney, and Malheur counties.
- The stated goal of enrolling 40% of privately owned sage-grouse Preliminary Priority Habitat in CCAAs by September 30th, 2017 has unclear ecological benefits, as the rationale for selecting 40% (as opposed to another percentage) was not clearly stated. It is also vague how these private lands will be prioritized.
- An analysis of baseline information is not well described in the application and it is unclear as to who is responsible for monitoring. A lot of monitoring information is available and was not included in the application.
- The description of adaptive management is weak in the application, as no threshold values are identified that would trigger adaptive management. Targets should be clearly defined so that trend monitoring is effective, and there is a way to measure success.
- The level of specificity for the actions should be finer. For example, will the 14,680 acres of juniper removal be spread across the focus areas or concentrated in discrete locations?
- It is unclear the role each partner plays in the initiative, a structural framework of the partnership would strengthen the application. There is also a concern about how the Districts that are not involved in the Phase II application, yet still listed in the Strategic Action Plan, will remain a part of the overall partnership.

6. Phase II Application Issues of Concern (not weaknesses, but issues where additional information or discussion may be needed):

- Working lands easements are discussed as a tool in the Strategic Action Plan, but there is a question as to what entity would hold conservation easements in this area.
- Will the determination by USFWS that protection for sage-grouse under the ESA is no longer warranted have an adverse effect on landowner enrollments and completing CCAAs?
- Descriptions of what livestock grazing regimes are compatible with sage-grouse, and at what utilization rates, are important issues for the partners to consider.
- Successful restoration in warmer, drier portions of the sagebrush ecosystem is challenging and the initiative should be structured in a way that high-risk habitats are protected, and knowledge gained from restoration in these areas is shared with other practitioners.
- As the scale and scope of treatments in the sagebrush ecosystem increases, will there be sufficient contractor capacity to meet demand?

7. Rating of Phase II Application: Medium (+)

8. Summary of Phase I Evaluation: Strengths identified in the Phase I evaluation included the discussion of conservation needs and the approach towards developing and implementing CCAAs in the partnering counties. The partnership was seen as strong and involving the right entities. The Strategic Action Plan included a good discussion on monitoring, and significant match was secured for the initiative. Weaknesses identified in the Phase I evaluation included the lack of coordination with restoration efforts on federal land, the distribution of funding across the focus areas which appeared broad and not entirely strategic, the unclear process for how landowners will be recruited, and not distinguishing roles and responsibilities of the partners. The partnership was invited by the Board Subcommittee to submit a Phase II application. However, the Subcommittee also requested that certain identified weaknesses with the application be addressed in the Phase II application.

9. Combined Phase I and Phase II Rating: Medium (+)

10. Board Subcommittee Discussion

- Ecologically important and contributing to a big difference in the community.
- Big improvement from the Phase 1 application to the Phase 2; this speaks well of the partnership.
- Impressive turnout of partners at the subcommittee meeting.
- The transition in the community from four years ago, when ODFW first started working on a sage grouse plan, is phenomenal; we need to continue to encourage the effort.
- This is a science-based, historic effort that will provide regulatory certainty for all.
- OWEB has made a commitment to the State and to the region; the partnership deserves our support.
- The Fish and Wildlife Service's five-year review associated with the determination not to list sage grouse under ESA protections is the driver, and will keep the partnership on a steady course.
- Strong model of collaboration.

11. Board Subcommittee Ranking: 4 of 9

12. Board Subcommittee Recommendation: Fund at a reduced amount of \$2,019,030 for the 2015-2017 biennium.

FIP Implementation Application Review Summary

1. **Name of Focused Investment Partnership Initiative:** Ashland Forest All-lands Restoration
2. **Initiative connection to Board-identified Priority(ies):** Dry-type Forest Habitat
3. **Budget Overview:**

Funding Period	OWEB Funding Request	Estimated Leverage
Biennium 1	\$1,660,000	\$3,880,000
Biennium 2	\$2,340,000	\$1,740,000
Biennium 3	\$2,000,000	\$1,580,000
Total	\$6,000,000	\$7,200,000

4. **Phase II Application Strengths:**

- The Phase II application better describes how ecological outcomes will be met through forest restoration activities.
- Good utilization of existing conservation plans and strategies.
- The discussion of natural range of variability as it relates to fire in this area provides useful context.
- Excellent use of monitoring hypotheses that can be monitored and will lead to adaptive management.
- Tying oak restoration to conifer treatments in the target area is beneficial from an ecological and community outreach perspective.
- 1,000 private acres already enrolled in the initiative is an important first step, and if this level of landowner recruitment is sustained, the partners can easily meet their acreage goals.
- The secured contributions through the City of Ashland utility rate increases dedicated to watershed restoration are critical and demonstrate unusually high community support.
- The leverage from federal partners (e.g., Two Chiefs' Joint Landscape Initiative and U.S. Forest Service) show the initiative is working on a true "all-lands" approach.
- The work plan and budget contain a good mix of restoration action, project development, monitoring, and capacity building.

5. **Phase II Application Weaknesses:**

- Landowner and community outreach deliverables are vague. How many landowners need to be involved to make this initiative effective? Will the initiative target landowners with large acreages, numerous small acreage landowners, or both?
- The number of treatment acres funded through an OWEB FIP is unclear.
- While the applicant has reduced the OWEB request, the cost per acre remains high.
- There appears to be some misalignment between the work plan and the budget. For example GIS modeling and prioritization is listed as an action in the 1st biennium, but does not show up in the budget until the 2nd biennium. In the work plan, GIS modeling and prioritization is not listed as an action in the 2nd biennium.
- There are concerns that all the leverage in the 2nd and 3rd biennia are listed as secure and whether federal partners can commit to that.

6. Phase II Application Issues of Concern (not weaknesses, but issues where additional information or discussion may be needed):

- The tie in to aquatic health would benefit from further discussion. Specifically how will forest restoration in the target area lead to water quality or habitat improvements?
- Lomakatsi is a strong partner with community support. However, as the lead partner on the majority of actions, they will need additional capacity.
- If native seeding is utilized, the partners should monitor effectiveness as this is a controversial action which may not be needed.
- Treating 28% of the landscape is bordering on the threshold of effectiveness and the applicant did not address whether treatments would occur mainly near roads and trails, and minimize treating ridgetops as was suggested in the Phase I evaluation.
- It is encouraged that the partners monitor benefits to wildlife (e.g., Northern Spotted Owl and Pacific Fisher) in treatment areas.
- When prioritization efforts are underway, the initiative would benefit by prioritizing landowner outreach in a way that allows them to target landowners in high priority areas and not treat opportunistically.
- While the ecological focus is tighter in the Phase II application, concerns remain that symptoms are being treated with forest thinning, and the initiative needs to work toward restoring ecosystem functions, so that this work will not need to be repeated every 20 years.

7. Rating of Phase II Application: High -

8. Summary of Phase I Evaluation: Strengths identified in the Phase I evaluation included the high functioning partnership, high degree of community support, innovative match, and reasonable actions within the designated timeframe. Weaknesses identified in the Phase I evaluation included how forest treatments would lead to ecological outcomes, outreach details, overall cost per acre of the initiative, and whether the partnership could deliver on private lands in a strategic manner. The partnership was invited by the Board Subcommittee to submit a Phase II application.

9. Combined Phase I and Phase II Rating: High (-)

10. Board Subcommittee Discussion

- Impressive organization, leverage of resources.
- Significant community involvement; a potential model to restore dry-type forests and to be self-reliant over time.
- Strong partnership and good collaboration with a track record; good model for work across a large landscape.
- Not much from a fish and wildlife perspective, but we need to “test drive” some of these programs to determine if they are effective.

11. Board Subcommittee Ranking: 5 of 9

12. Board Subcommittee Recommendation: Fund at the reduced amount of \$1,543,800 for the 2015-2017 biennium.

FIP Implementation Application Review Summary

1. **Name of Focused Investment Partnership Initiative:** Upper Grande Ronde Initiative
2. **Initiative connection to Board-identified Priority(ies):** Aquatic Habitat for Native Fish
3. **Budget Overview:**

Funding Period	OWEB Funding Request	Estimated Leverage
Biennium 1	\$1,722,000	\$9,381,000
Biennium 2	\$2,416,500	\$17,795,000
Biennium 3	\$2,777,000	\$17,803,000
Total	\$6,915,500	\$44,979,000

4. **Phase II Application Strengths:**

- Well-developed partnerships, including Confederated Tribes of the Umatilla Indian Reservation, Columbian River Inter-Tribal Fish Commission, Oregon Dept of Fish and Wildlife, Bureau of Reclamation, US Forest Service, and Bonneville Power Administration. The Freshwater Trust will assist with acquisitions/water leasing. Partners have been working collaboratively for over 20 years.
- Well-developed priorities that are based on limiting factor analysis and existing recovery plan documents.
- The Atlas document for Catherine Creek and the Upper Grande Ronde is an excellent tool. The Atlas utilizes existing scientific data, current research evidence, and current knowledge of local biologists to create a strategic, collaborative, and prioritized habitat implementation plan. The initiative focuses on Biologically Significant Reaches.
- Highly leveraged initiative.
- Good sustainability strategy: adequately fund maintenance and use conservation easements in key locations.
- Good adaptive management process through monthly partner meetings.
- The MOU clearly identifies the roles and responsibilities of each of the core partners as they relate to implementation of the Upper Grande Ronde partnership.
- Implementing CHaMP (Columbia Habitat Monitoring Program) for site-scale monitoring and PHaMS (Physical Habitat Monitoring Strategy) for reach-scale monitoring.

5. **Phase II Application Weaknesses:**

- It is difficult to determine the context for this work. What has been accomplished to date and what does the monitoring data show? How has the previous work changed the baseline and what is the new baseline?
- Need to better connect the dots in the monitoring data and monitoring plan.
- It is not clear how many landowners are lined up for project implementation.
- The application mentions that BPA and BOR are unable to supply adequate design resources, yet the budget has very little design funds (\$85,000 in biennium 1).
- Need better linkage between proposed actions and limiting factors.

6. Phase II Application Issues of Concern (not weaknesses, but issues where additional information or discussion may be needed):

- Outreach plan is vague; budget includes \$60,000 for 0.5 FTE outreach position.
- It is unclear whether constructed alcoves will be self-sustaining.
- Will water efficiency projects result in protected in-stream water rights?

7. Rating of Phase II Application: Medium (+)

8. Summary of Phase I Evaluation: Strengths identified in the Phase I evaluation included clearly defined partner roles and responsibilities, good leverage, clear and detailed objectives, and clearly defined priorities expressed by stream reach with respect to limiting factors. Weaknesses included success evaluation, adaptive management, and sustainability. The Phase I evaluation recommended, including PHaMS, which the partnership included in the Phase II application. The Board Subcommittee invited a Phase II implementation application.

9. Combined Phase I and Phase II Rating: Medium (+)

10. Board Subcommittee Discussion

- Well-written application, the Atlas is an excellent tool for strategic prioritization and implementation.
- Good structure/organization; exceptionally strong and disciplined partnership.
- Strong partnership, track record, community engagement.
- Excellent match funding that ensures the work will be accomplished with or without FIP funding; FIP funding will accelerate the pace of implementation.
- Cost-benefit is terrific; the work will move the “ecological dial” better here than in other FIPs.

11. Board Subcommittee Ranking: 6 of 9

12. Board Subcommittee Recommendation: Fund at a reduced amount of \$1,601,460 for the 2015-2017 biennium.

FIP Implementation Application Review Summary

1. Name of Focused Investment Partnership Initiative:

Sandy River Fish Habitat Restoration (Sandy River Basin Partners)

2. Initiative connection to Board-identified Priority(ies):

Aquatic Habitat for Native Fish Species

3. Budget Overview:

Funding Period	OWEB Funding Request	Estimated Leverage
Biennium 1	\$2,810,000	\$1,770,000
Biennium 2	\$2,440,000	\$2,000,000
Biennium 3	\$3,700,000	\$1,720,000
Total	\$8,950,000	\$5,490,000

4. Phase II Application Strengths:

- A clear stronghold for recovery of ESA-listed fish species.
- Manageable geography, three priority areas.
- Builds on prior and ongoing efforts.
- Strong track record of putting work on the ground.
- The proposed FIP provides a unique opportunity to finish a plan, identify the strengths/weaknesses of the Ecosystem Diagnostic and Treatment (EDT) approach to inform future strategic planning processes based on models, and provide information to establish realistic expectations for timeframes for restoring watersheds.
- Proposed restoration and project prioritization are grounded in an accepted scientific tool (EDT).
- The partners are clearly thinking about how to get at watershed restoration.
- With the removal of Marmot Dam in 2007, this is now a mostly barrier-free system, potentially allowing for real fish gains.

5. Phase II Application Weaknesses:

- EDT is a model whose outputs imply a greater degree of precision than can be reasonably expected of a model and should be applied in conjunction with follow-up monitoring
- While the application includes robust modeling and analysis, it does not appear to “connect the dots” with respect to improving processes. For example, how do the many proposed in-stream wood placements affect sediment recruitment and habitat restoration in dynamic river segments?
- Why are the current floodplain channels not currently activated, and how will the proposed actions affect floodplain activation?
- Restoring year-round flow in side channels seems unrealistic given that side-channel flow is typically seasonal.
- It is unclear, especially in the mainstem Sandy, what maintenance will be required for the proposed actions.
- Unclear whether this is in fact a high-performing partnership or a loose consortium of independent players. The application does not provide much insight on how the partnership works together (e.g., governance, leadership, decision-making, etc.). What process is used by the subcommittee that identifies and prioritizes projects? How would it manage adaptively in the event of a budget reduction? In the event of a project setback?
- The adaptive management discussion should include lessons learned, if any, from failed instream wood structures.

- The monitoring plan should include more robust temperature, fine sediment, fish, and in-stream wood effectiveness monitoring.
- The Outreach discussion should include what has occurred to date, especially in the lower watershed, and what lessons, if any, have been learned.

6. Phase II Application Issues of Concern (not weaknesses, but issues where additional information or discussion may be needed):

- Are the proposed actions the highest priority, the ones that will “move the dial” on fish recovery in this watershed? Reviewers expressed the following two concerns:
 - ~ The lower watershed (mainstem Sandy) is much more problematic from an ecological and social perspective than the upper watershed (Salmon and Still creeks), which is mostly intact. The lower watershed requires attention in the social realm of working to prevent further development in the floodplain and illegal water withdrawals.
 - ~ There appears to be a disconnect between the relative good health of the upper watershed and the needs identified by the EDT analysis.
- The application should address how levees and existing side channels affect river process issues. River dynamism has been important historically to fish production in the Sandy, and may preclude the need for instream wood in some locations.
- Effectiveness monitoring needs to be more rigorous. Past monitoring of instream structures has shown a rise in fish use, but this monitoring did not include fish productivity.
- Ultimately, the review determined that while this Sandy Basin has high potential as an important fish-recovery area, the proposed approach and activities appear to focus on addressing the symptoms, rather than the root causes of limiting factors.

7. Rating of Phase II Application: MEDIUM

8. Summary of Phase I Evaluation: The application outlined reasonable and appropriate measurable ecological outcomes that the partnership will pursue in addressing the Board-approved priority. The strategic action plan was strong. Leveraging capacity is high. On the strength of the Phase 1 application, the partnership was invited to submit a Phase 2 application. Though the partners have a long history of collaborating, the application is light on detail about partnership processes and lessons learned. The leadership element is vague.

9. Combined Phase I and Phase II Rating: MEDIUM

10. Board Subcommittee Discussion

- Strong partnership, good track record, potential to turn the “ecological dial.”
- Better bang for the buck elsewhere.

11. Board Subcommittee Ranking: 7 of 9

12. Board Subcommittee Recommendation: Do Not Fund

FIP Implementation Application Review Summary

1. Name of Focused Investment Partnership Initiative:
Millicoma Forks Coastal Coho Restoration Partnership

2. Initiative connection to Board-identified Priority(ies):
Coho Habitat and populations along the Oregon Coast
Aquatic Habitat for Native Fish Species

3. Budget Overview:

Funding Period	OWEB Funding Request	Estimated Leverage
Biennium 1	\$1,780,000	\$1,870,000
Biennium 2	\$1,540,000	\$780,000
Biennium 3	\$2,660,000	\$1,130,000
Total	\$5,980,000	\$3,780,000

4. Phase II Application Strengths:

- The proposal correctly references applicable plans, including the NOAA Fisheries' Southern Oregon Northern California Coast (SONCC) Coho Recovery Plan.
- The application materials demonstrate that the partnership has a good understanding of the system's limiting factors.
- The prioritization methods used in the Supplemental Action Plan for the Millicoma River Forks are sound; in particular, the prioritization process for instream habitat complexity was well developed.
- The partnership correctly identified Marlow Road as the key problem for addressing sediment in the West Fork Millicoma River. The application and SAP deal well with the sediment issue in the system. The actions presented in the application dealing with roads will begin to address the limiting factor for sediment.
- Implementation of the actions in the proposal would move the Millicoma toward the tipping point in terms of high quality habitat. There is a lot of potential for getting the system closer to high intrinsic potential targets and thus significantly increasing coho.
- The Coos Watershed Association has demonstrated good data collection, monitoring, adaptive management and the ability to implement. The expectation is that this would continue under a FIP Implementation Initiative, including the metrics and monitoring proposed in this application.
- The budget is realistic and targeted almost entirely toward on-the-ground restoration. Substantial leverage will be brought to the initiative.

5. Phase II Application Weaknesses:

- Experts felt that the application did not articulate how the proposed actions would address the broken natural processes in the system, and they felt this was particularly true for the limiting factor of instream complexity.
- Engineered log jams in the mainstem of the east and west forks could be valuable for short term gains toward instream complexity as a limiting factor, but questions remain as to the longevity of the log jams. Reviewers question whether the restoration actions being proposed for instream complexity will address the underlying broken natural processes in a manner that would solidify the gains as long term.
- There were questions related to the fish passage component of the proposal which were not as well developed compared to sediment and instream complexity discussions.

- The lead partner, Coos Watershed Association, lacks a permanent Executive Director, raising questions about the stability/capacity of the partnership.

6. Phase II Application Issues of Concern (not weaknesses, but issues where additional information or discussion may be needed):

- The forthcoming change in ownership related to some of the Common School Fund lands in the Elliot State Forest leaves uncertainty related to the potentially new or changed impacts to natural processes in the system.
- Concern remains that paving haul roads, such as Marlow Road, will result in increased timber harvest with unknown consequences to the Coos watershed, including increased sediment.
- There continues to be uncertainty as to why the East and West Forks of the Millicoma were prioritized over other portions of the Coos Watershed.

7. Rating of Phase II Application: MEDIUM (+)

- 8. Summary of Phase I Evaluation:** The proposed initiative is an appropriate scale, scope, and pace for the FIP program. The proposed initiative has the potential to measurably improve habitat for Coho and other fish and wildlife, and the partners have a long history of successful implementation. Concerns centered around the recent departure of the Coos Watershed Association’s Executive Director, whether the partnership meets the requirements of the FIP program, and outstanding questions related to the projects that will underpin the initiative application. Additionally, because the SAP was a compilation of two separate documents written at different times and for different purposes, there were disconnects in prioritization rationale, particularly related to why the Millicoma Forks were selected over an area lower in the system and whether the initiative was a greater benefit to Coho or chinook.

9. Combined Phase I and Phase II Rating: MEDIUM

10. Board Subcommittee Discussion

- The scale may be too small, but it’s a worthy project, focused on Coho.
- Strong partnership, even with the recent departure of their long-term executive director.
- Coos Watershed Association has a strong implementation record; projects provide a good cost/benefit.
- Good relationship with Weyerhaeuser; need to support such relationships where they occur.
- Concern that OWEB might be putting money into correcting “legal” harvesting activities in riparian areas.

11. Board Subcommittee Ranking: 8 of 9

12. Board Subcommittee Recommendation: Do Not Fund

FIP Implementation Application Review Summary

1. Name of Focused Investment Partnership Initiative:

McKenzie River Native Fish and Water Quality Initiative (McKenzie Collaborative)

2. Initiative connection to Board-identified Priority(ies):

Aquatic Habitat for Native Fish Species

3. Budget Overview:

Funding Period	OWEB Funding Request	Estimated Leverage
Biennium 1	\$1,850,000	\$3,550,000
Biennium 2	\$2,000,000	\$2,320,000
Biennium 3	\$2,000,000	\$2,800,000
Total	\$5,850,000	\$8,670,000

4. Phase II Application Strengths:

- The link between limiting factors and proposed work is strong.
- Good use of existing strategies (e.g., Oregon Conservation Strategy).
- Match is excellent.
- Partnership is motivated and diverse.
- Application clearly calls out barriers (e.g., dams, fragmented landownership preventing Voluntary Incentives Program [VIP] from having significant impacts), and describes activities that present opportunities for the partnership.
- The proposal offers an opportunity to test how linking drinking water and habitat restoration as dual benefits could engage landowners/communities more effectively.

5. Phase II Application Weaknesses:

- Many partnership elements appear to be pending. The partnership is largely untested in the implementation of large-scale projects.
- Some activities proposed in the application are already under way or are being implemented by others (e.g., hatchery carcass placement).
- No information is provided on transport capacity, current imbalances, or how plans for instream wood will affect gravel augmentation.
- A lot of activities are being proposed, which gives the application a shotgun feel, and detail on these activities and a rationale are generally lacking. For example, are there lasting benefits to loading wood into the good habitat above the dams? How valuable is it to augment gravel below Cougar Dam, only to have it trapped at Leaburg Dam lower in the system?
- More discussion was needed of permanent protections – easements and fee title acquisitions.
- There is no nexus in the application between watershed health and water quantity.
- SLICES is an important tool, but probably not at this scale.
- Outreach plan seems passive overall. Connection of youth-related outreach is vague and unclear how it is a critical element to achieving FIP outcomes.

6. Phase II Application Issues of Concern (not weaknesses, but issues where additional information or discussion may be needed):

- Many of the proposed activities, while helpful, are non-sustaining (e.g., loading gravel, instream wood structures, carcass placement), and therefore, offer low confidence that real ecological gains can be had.

- While it is generally a good idea to restore habitat below dams, the goal of restoring 6,000-8,000 cubic feet per second (cfs) below Cougar Dam is probably unrealistic. The goal is highly dependent on actions taken by the Corps of Engineers at the dam, which are unlikely to occur anytime soon.
- The VIP program is innovative, but it is unclear how the applicant arrived at the figure of 600 landowners the partnership expects to recruit. Since the program must rely on willing landowners, it seems quite opportunistic.
- The monitoring discussion does not seem to be well-connected to ecological outcomes (e.g., barrier removals). How does the proposed monitoring connect up to moving toward outcomes over time and space?
- The lower watershed is the area of real need where some fish rearing occurs; it should be the focus of all practitioners in the watershed.
- Reviewers felt that without fish passage, the “dial” cannot be moved far in this watershed. The proposed activities, while helpful, cannot restore vital processes; rather, they can only patch a hole.

7. Rating of Phase II Application: MEDIUM

8. Summary of Phase I Evaluation: The application outlined reasonable and appropriate measurable ecological outcomes that the partnership will pursue in addressing the Board-approved priority. The partnership has a long history of collaboration and landowner engagement through the VIP. The strategic action plan was strong. Leverage was very strong. On the strength of the Phase 1 application, the partnership was invited to submit a Phase 2 application.

9. Combined Phase I and Phase II Rating: MEDIUM

10. Board Subcommittee Discussion

- Strong partnership, trying to protect a unique ecosystem, creative Voluntary Incentives Program (VIP).
- The McKenzie River is a hugely important source of cold water to the Willamette.
- From a fisheries perspective, the ability to move the “ecological dial” is limited.
- The scale seems large (5 of 7 sub-watersheds) with lots of different work.
- No real stand-out element in this proposal compared to the others.

11. Board Subcommittee Ranking: 9 of 9

12. Board Subcommittee Recommendation: Do Not Fund