OREGON
WATERSHED
ENHANCEMENT BOARD

Hybrid **Meeting**

Enterprise

July **26-27, 2022**

Oregon Watershed Enhancement Board Meeting Agenda July 26 & 27, 2022

Business Meeting:	**Tuesday, 8:00 a.m.**	**Wednesday, 8:00 a.m.**

Eagle View Inn & Suites
1200 Highland Avenue
Enterprise, OR 97828
Directions: https://goo.gl/maps/3YprbAtd77MBkzzo9

The public is welcome to attend the meeting in-person, or to view and listen to the meeting through the following methods:

- **YouTube Streaming**: https://www.youtube.com/channel/UC0dl-TOwLt4Sp--i1KEa_OA. Please note that there may be a slight delay when streaming the meeting content.
- **Phone**:
  - **July 26:** Dial 1 669 900 6833, when prompted, enter ID number: 847 3512 7826 and passcode: 946728
  - **July 27:** Dial 1 669 900 6833, when prompted, enter ID number: 833 7344 7495 and passcode: 276821
- The board book (eBook) is available at: https://www.oregon.gov/oweb/about-us/Pages/board/meetings.aspx
- For each agenda item, the time listed is approximate. Anyone interested in a particular agenda item is encouraged to give ample time and listen in to the meeting at least 30 minutes before the approximate agenda item time.

Public comment
OWEB encourages written or verbal public comment on any agenda item. All comment requests should be sent to April Mack at April.mack@OWEB.oregon.gov no later than 4:00 p.m. Thursday, **July 21**.

Written comments will be provided to the board in advance of the meeting.

Verbal comments:

- Limited to three minutes
- Will be heard in the public comment period (**Agenda Items C, E, G, K and M**).
- Provide the following information:
  - Your first and last name,
  - The topic of your comment, and
  - The phone number you will use when calling the meeting. Also, note if the phone is a landline and you prefer to be scheduled for public comment early to avoid long distance phone call charges.

Tuesday, July 26, 2022

A. Board Member Comments (8:15 a.m.)
Board representatives from state and federal agencies will provide updates on issues related to the natural resource agency they represent. This is also an opportunity for public and tribal board members to report on their recent activities and share information and comments on a variety of watershed enhancement and community conservation-related topics. *Information item*.

B. Review and Approval of Minutes (9:15 a.m.)
The minutes of the April 26-27, 2022, virtual meeting will be presented for board approval. *Action item*.

C. General Public Comment (9:20 a.m.)
This time is reserved for the board to hear general public comment and review the written public comment submitted for the meeting. *Information item*.

D. Committee Updates (9:35 a.m.)
Representatives from board committees will provide updates on committee topics to the full board. *Information item*.

E. 2021-2023 Focused Investment Partnership Awards (10:05 a.m.)
Grant Program Manager Eric Williams will provide background information and Grants Committee ranking on the Focused Investment Partnership (FIP) solicitation for the 2021-2023 biennium.

Verbal public comment specific for this agenda item will be heard at approximately 10:20 a.m.

Funding recommendations will be discussed and acted on by the board. *Action item*.

F. Spending Plan Rebalance (11:35 a.m.)
Executive Director Lisa Charpilloz Hanson will seek board approval to add funds to the 2021-2023 spending plan. The additions to the spending plan include funds held in reserve, recaptured grant funds, and Federal Fiscal Year 2022 Pacific Coastal Salmon Recovery Funds. *Action item.*

G. Climate Resolution Listening Session Report and Initiate Rulemaking (1:05 p.m.)
Deputy Director Stephanie Page, Grant Program Manager Eric Williams, Board and Legislative Policy Coordinator Eric Hartstein and Water and Climate Coordinator Jessi Kershner will update the board on the climate resolution public engagement process, including providing an overview of engagement opportunities, participants, and key findings.

Verbal public comment specific for this agenda item will be heard at approximately 1:35 p.m.

Depending on the outcome of discussion, the board may consider whether to authorize associated rulemaking. *Action item*.

H. Wallowa Dam Rehabilitation and Fish Passage (2:35 p.m.)
Executive Director Lisa Charpilloz Hanson, Deputy Director Stephanie Page and representatives from the Nez Perce Tribe and Confederated Tribes of the Umatilla Indian Reservation will present to the board planned improvements to the Wallowa Lake Dam. *Information item*.

Tour – 3:30 p.m.
The board and OWEB staff will conduct a field tour of the Wallowa Lake Dam. Anyone is welcome to join the tour, but please be prepared to provide your own transportation and be prepared for inclement weather.

Informal Reception – 5:20 p.m. - 6:20 p.m.

The public is invited to join the OWEB Board and staff at a reception sponsored by local partners and stakeholders.

Location:
The Place
303 S Lake Street,
Joseph, OR, 97846
Directions: https://goo.gl/maps/AK1bRjEBvmcehnmR7

Wednesday, July 27, 2022

I. DEI Discussion (8:05 a.m.)
Business Operations Manager Courtney Shaff will present ECONorthwest, OWEB's consultant on diversity, equity, and inclusion, who will then facilitate a discussion to identify and develop equity goals for the board. *Information item*.

J. Strategic Plan Update – Annual Progress Report (9:35 a.m.)
Business Operations Manager Courtney Shaff, Conservation Outcomes Coordinator Audrey Hatch, and Publications Specialist Linda Repplinger will provide the board with an update on progress towards implementation of the 2018 strategic plan and present a new proposed reporting format. *Information item.*

K. General Public Comment (10:05 a.m.)
This time is reserved for the board to hear public general comment and review the written public comment submitted for the meeting. *Information item*.

L. Director and Staff Updates (10:30 a.m.)
Executive Director Lisa Charpilloz Hanson and staff will update the board on agency business. *Information item.*

M. Organizational Collaboration Awards (11:00 a.m.)
Business Operations Manager Courtney Shaff will provide an overview of the 2022 Organization Collaboration grant offering and staff funding recommendations. *Action Item.*

N. 2023-2025 Agenda Request Budget and Future Organizational Chart (11:40 a.m.)
Executive Director Lisa Charpilloz Hanson, and Deputy Director Stephanie Page will present the proposed 2023-2025 organizational chart and request board approval of the Policy Option Package list to be submitted with OWEB's 2023-2025 Agency Request Budget. *Action item.*

O. Tide Gate Funds Delegation Request (12:40 p.m.)
Coastal Programs Coordinator Jillian McCarthy will request that the board accept up to $70,000 of state lottery funding from the Oregon Business Development Department (OBDD) and delegate authority to the Executive Director to enter into agreements for tide gate technical studies that have a statewide benefit for tide gate project development. *Action item.*

Meeting Rules and Procedures

Meeting Procedures
Generally, agenda items will be taken in the order shown. However, in certain circumstances, the board may elect to take an item out of order. To accommodate the scheduling needs of interested parties and the public, the board may also designate a specific time at which an item will be heard. Any such times are indicated on the agenda.

Please be aware that topics not listed on the agenda may be introduced during the Board Comment period, the Executive Director's Update, the Public Comment period, under Other Business, or at other times during the meeting.

Oregon's Public Meetings Law requires disclosure that board members may meet for meals when OWEB meetings convene.

Voting Rules
The OWEB Board has 18 members. Of these, 11 are voting members and 7 are ex-officio. For purposes of conducting business, OWEB's voting requirements are divided into 2 categories – general business and action on grant awards.

General Business
A general business quorum is **6 voting members**. General business requires a majority of **all** voting members to pass a resolution (not just those present), so general business resolutions require affirmative votes of **at least 6 voting members**. Typical resolutions include adopting, amending, or appealing a rule, providing staff direction, etc. These resolutions cannot include a funding decision.

Action on Grant Awards
Per ORS 541.360(4), special requirements apply when OWEB considers action on grant awards. This includes a special **quorum of at least 8 voting members** present to act on grant awards, and affirmative votes of at least six voting members. In addition, regardless of the number of members present, **if 3 or more voting members** object to an award of funds, the proposal will be rejected.

Executive Session
The board may also convene in a confidential executive session where, by law, only press members and OWEB staff may attend. Others will be asked to leave the room during these discussions, which usually deal with current or potential litigation. Before convening such a session, the presiding board member will make a public announcement and explain necessary procedures.

More Information
If you have any questions about this agenda or the Board's procedures, please call April Mack, OWEB Board Assistant, at 971-345-7001 or send an e-mail to april.mack@OWEB.oregon.gov. If special physical, language, or other accommodations are needed for this meeting, please advise April Mack as soon as possible, and at least 48 hours in advance of the meeting.

Oregon Watershed Enhancement Board Membership

Voting Members

Barbara Boyer, *Board Co-Chair, Board of Agriculture*
Brenda McComb, *Board of Forestry*
Bruce Buckmaster, *Public*
Gary Marshall, *Public*
Greg Addington, *Environmental Quality Commission*
Jamie McLeod-Skinner, *Public*
Kelly Coates, *Public (Tribal)*
Lindsay McClary, *Public*
Liza Jane McAlister, *Board Co-Chair, Public*
Mark Labhart, *Fish and Wildlife Commission*
Meg Reeves, W*ater Resources Commission*

Non-voting Members

Vacant, *U.S. Bureau of Land Management*
Chris Allen, U.S. Fish & Wildlife Service
Cory Owens, *U.S. Natural Resources Conservation Service*
Dan Brown, *U.S. Environmental Protection Agency*
Dan Shively, *U.S Forest Service*
Eric Murray, *National Marine Fisheries Service*
Stephen Brandt, *Oregon State University Extension Service*

Contact Information

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Salem, Oregon 97301-1290
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OWEB Executive Director – Lisa Charpilloz Hanson
Lisa.CHARPILLOZ.HANSON@OWEB.oregon.gov

OWEB Assistant to Executive Director and Board – April Mack
april.mack@OWEB.oregon.gov
971-345-7001

2022 Board Meeting Schedule
October 25 & 26 - Tillamook
2023 Board Meeting Schedule
January - Virtual

For online access to staff reports and other OWEB publications, visit our web site: www.oregon.gov/OWEB.

The Approach We Take

We believe that every endeavor is guided by a set of commitments not just about the "why" and the "what," but also the "how." These are the ways we are committed to engaging in our work. This is our approach. These principles modify everything we do.

Our work is characterized by…

Involving stakeholders broadly and in partnership

- Involving the community members at all levels
- Promoting community ownership of watershed health
- Collaborating and authentically communicating
- Bringing together diverse interests
- Building and mobilizing partnerships

Using best available science supported by local knowledge

- Basing approaches on the best available science
- Advancing efficient, science driven operations
- Addressing root sources and causes
- Incorporating local knowledge, experience, and culture
- Catalyzing local energy and investment

Investing collaboratively with long-term outcomes in mind

- Aligning investments with current and potential funding partners
- Maintaining progress into the future
- Stewarding for the long term
- Taking the long view on projects and interventions

Demonstrating impact through meaningful monitoring and evaluation

- Providing evidence of watershed change
- Measuring and communicating community impact
- Increasing appropriate accountability
- Incorporating flexibility, adaptive management – when we see something that's not working, we do something about it

Reaching and involving underrepresented populations

- Seeking to include the voice and perspectives that are not typically at the table
- Specific, targeted engagement
- Ensuring information is available and accessible to diverse audiences

OWEB Staff Culture Statement

We are dedicated to OWEB's mission and take great pride that our programs support watershed health and empower local communities. Our work is deeply rewarding and we are passionate about what we do. Our team is nimble, adaptable, and forward-thinking, while remaining grounded in the grassroots history of watershed work in Oregon. With a strong understanding of our past, we are strategic about our future. We believe in working hard while keeping our work environment innovative, productive, and fun. We are collaborative, both with each other and with outside partners and organizations, and place great value in continually improving what we do and how we do it.

2021- 2023 SPENDING PLAN FOR MEASURE 76 (LOTTERY), GENERAL FUNDS AND PCSRF FUNDS

July 2022 Board Meeting

	GRANTS	2021 Spending Plan as of April 2022	July 2022 additions	2022 Spending Plan	TOTAL Awards To-Date	July 2022 Proposed Board Awards	TOTAL Awards To-Date & Proposed Awards	Remaining Spending Plan after Awards To-Date	Other Funding Received & Delegated
1	**Open Solicitation:**								
2	Restoration	32.000	3.500	35.500	15.776		15.776	19.724	0.780
3	Technical Assistance								
4	Restoration TA	3.000	2.500	5.500	1.967		1.967	3.533	-
5	CREP TA	1.200		1.200	1.200		1.200	-	0.400
6	Stakeholder Engagement	2.250	0.500	2.750	0.773		0.773	1.977	-
7	Monitoring grants	4.250	0.500	4.750	1.837		1.837	2.913	-
8	Land and Water Acquisition	9.000	1.500	10.500	3.079		3.079	7.421	0.490
9	Weed Grants	3.250		3.250	3.250		3.250	-	-
10	Small Grants	2.800		2.800	2.800		2.800	-	-
11	Quantifying Outputs and Outcomes	1.000	0.250	1.250	0.150		0.150	1.100	-
12	**TOTAL**	**58.750**	**8.750**	**67.500**	**30.832**	**-**	**30.832**	**36.668**	**1.670**
13	**% of Total Core Programs**	**53.82%**		**54.66%**					
14	**% of OWEB Spending Plan total**	**37.96%**		**39.92%**					
15	**Focused Investments:**								
16	Deschutes	1.915		1.915	1.915		1.915	-	-
17	Willamette Mainstem Anchor Habitat	1.400		1.400	1.400		1.400	-	-
18	Harney Basin Wetlands	0.100		0.100	0.100		0.100	-	-
19	Upper Grande Ronde	0.466		0.466	0.466		0.466	-	-
20	John Day Partnership	4.000		4.000	4.000		4.000	-	-
21	Baker Sage Grouse	2.435		2.435	2.435		2.435	-	13.250
22	Warner Aquatic Habitat	2.293		2.293	2.293		2.293	-	-
23	Rogue Forest Rest. Ptnrshp	2.700		2.700	2.700		2.700	-	-
24	Clackamas Partnership	3.082		3.082	3.082		3.082	-	-
25	New FIP Solicitation	10.000	3.000	13.000	-	12.910	12.910	0.090	-
26	FI Effectiveness Monitoring	0.750	0.250	1.000	0.750		0.750	0.250	-
27	**TOTAL**	**29.141**	**3.250**	**32.391**	**19.141**	**12.910**	**32.051**	**0.340**	**13.250**
28	**% of Total Core Programs**	**26.69%**		**26.23%**					
29	**% of OWEB Spending Plan total**	**18.83%**		**19.16%**					
30	**Operating Capacity:**								
31	Capacity grants (WC/SWCD)	15.121	1.900	17.021	15.121		15.121	1.900	-
32	Statewide org partnership support	0.225	0.225	0.450	0.225		0.225	0.225	-
33	Organizational Collaboration	0.500	0.200	0.700	0.130	0.237	0.367	0.333	-
34	Partnership Technical Assistance	1.500		1.500	0.797		0.797	0.703	-
35	**TOTAL**	**17.346**	**2.325**	**19.671**	**16.273**	**0.237**	**16.510**	**3.1610**	**-**
36	**% of Total Core Programs**	**15.89%**		**15.93%**					
37	**% of OWEB Spending Plan total**	**11.21%**		**11.63%**					
38	**Other:**								
39	CREP	0.750		0.750	0.750		0.750	-	-
40	Governor's Priorities	1.000		1.000	0.877	0.070	0.947	0.053	0.147
41	Strategic Implementation Areas	1.500		1.500	1.500		1.500	-	-
42	Gov. directed - Lower Columbia Estuary Partnership	0.330		0.330	0.330		0.330	-	-
43	Gov. directed - Sage Grouse Conservation Partnership	0.350		0.350	0.350		0.350	-	-
44	**TOTAL**	**3.930**	**-**	**3.930**	**3.807**	**0.070**	**3.877**	**0.053**	**0.147**
45	**% of Total Core Programs**	**2.54%**		**2.32%**					
46	**% of OWEB Spending Plan total**	**2.54%**		**2.32%**					
47	**TOTAL Core Programs**	**109.167**	**14.325**	**123.492**	**70.053**	**13.217**	**83.270**	**40.222**	**15.067**
48	**General Fund:**								
49	2020 Fire Recovery & Restoration								
50	Riparian/upland rest. & water quality	10.750		10.750	10.750		10.750	-	-
51	Floodplain restoration & reconnection	5.000		5.000	5.000		5.000	-	-
52	2021 Fire Recovery & Restoration	5.000		5.000	5.000		5.000	-	-
53	2021 Drought Resiliency								
54	Irrigation District Grants	1.551		1.551	1.551		1.551	-	-
55	Irrigation District Grants - N Unit	1.906		1.906	1.906		1.906	-	-
56	Jefferson Co Resiliency Grants	0.852		0.852	0.852		0.852	-	-
57	Klamath Livestock Wells & off channel const grants	2.733		2.733	2.733		2.733	-	-
58	Klamath Co Resiliency Grants	0.731		0.731	0.731		0.731	-	-
59	Jefferson SWCD Soil Conservation Grants	3.000		3.000	3.000		3.000	-	-
60	Oregon Agricultural Heritage Program (OAHP)								
61	OAHP Conservation Easements*	4.315		4.315	-		-	4.315	-
62	OAHP Conservation Management Plans*	0.150		0.150	-		-	0.150	-
63	Water Acquisitions	9.596		9.596	-		-	9.596	-
64	**TOTAL**	**45.584**	**-**	**45.584**	**31.523**	**-**	**31.523**	**14.061**	**-**
65	**% of OWEB Spending Plan total**	**29.46%**		**26.96%**					
66	**TOTAL OWEB Spending Plan**	**154.751**	**14.325**	**169.076**	**101.576**	**13.217**	**114.793**	**54.283**	**15.067**
67	**Funds transferred from/to other agencies**								
68	Transfer to ODFW - PCSRF	12.884		12.884	12.884		12.884	-	-
69	Transfer to Eugene Water & Electric Board - GF	4.000		4.000	4.000		4.000	-	-
70	Transfer from ODF for Forest Health Collaboratives-OF	0.500		0.500			-	0.500	0.500
71	Transfer from PSMFC - IMW - OF	0.600		0.600			-	0.600	0.600
72	Transfer from NRCS - Farm Bill technical support - FF	-		-	-		-	-	-
73	**TOTAL**	**17.984**	**-**	**17.984**	**16.884**	**-**	**16.884**	**1.100**	**1.100**
74	**OWEB Spending Plan & Other Directed Funds**	**172.735**	**14.325**	**187.060**	**118.460**	**13.217**	**131.677**	**55.383**	**16.167**

MINUTES ARE NOT FINAL UNTIL APPROVED BY THE BOARD

Oregon Watershed Enhancement Board (OWEB)
April 26 & 27, 2022 Board Meeting

Virtual Zoom Board Meeting
(Audio time stamps reference recording at: https://www.youtube.com/channel/UC0dl-TOwLt4Sp--i1KEa_OA.

OWEB MEMBERS PRESENT
Boyer, Barbara
Brandt, Stephen
Brown, Dan (4/27 only)
Buckmaster, Bruce
Coates, Kelly
Henson, Paul
Kile, Molly
Labhart, Mark
Marshall, Gary
McAlister, Liza Jane
McClary, Lindsay
McLeod-Skinner, Jamie
Murray, Eric
Owens, Cory
Reeves, Meg
Shively, Dan

OWEB STAFF PRESENT
Chabra, Max
Charette, Amy
Charpilloz Hanson, Lisa
Ciannella, Greg
Clark-Henry, Ivy
Davis, Renee
DeBardelaben, Theresa
Duzik, Katie
Greer, Sue
Grenbemer. Mark
Hartman, Heidi
Hartstein, Eric
Hatch Audrey
Hoffert, Denise
Kershner, Jessi
Mack, April
Menton, Coby
Page, Stephanie
Redon, Liz
Repplinger, Linda
Shaff, Courtney
Williams, Eric

OTHER
Gannon, Chris
Beamer, Kelley
Green, Vanessa
Warnock, Cynthia

Tuesday, April 26, 2022

The meeting was called to order at 8:00 by Co-Chair Liza Jane McAlister.

A. Board Co-Chair Re-appointment (Audio = 0.01.15)

The current term of Oregon Watershed Enhancement Board Co-Chair Liza Jane McAlister ends in April 2022. Board members voted to re-elect Liza Jane McAlister to continue as Co-Chair for a new two-year term. *Action item*.

Jamie McLeod-Skinner moved the Board reappoint Liza Jane McAlister to serve an additional two-year term. Mark Labhart seconded the motion. The motion passed unanimously.

B. Review and Approval of Minutes (Audio = 0:02.55)

The minutes of the January 25-26, 2022 virtual meeting was presented for board approval. *Action item*.

Barbara Boyer moved the board approve the minutes from the Jan 25 & 26, 2022 virtual meeting. Jamie McLeod-Skinner seconded the motion. The motion passed unanimously.

C. Board Member Comments (Audio = 0:03.47)

Board representatives from state and federal agencies provided updates on issues related to the natural resource agency they represent. Public and tribal board members also reported on their recent activities, shared information and comments on a variety of watershed enhancement and community conservation-related topics. *Information item*.

D. Committee Updates (Audio = 1:26.55)

Representatives from board committees provided updates on committee topics to the full board. *Information item*.

E. Public Comment (Audio = 1:34.33)

This time was reserved for the board to hear public general comment and review the written public comment submitted for the meeting. No public comments were made at this time. *Information item*.

F. 2022 Legislative Session Update and Amend Spending Plan (Audio = 1:35.14)

Deputy Director Stephanie Page summarized new funding and staff allocations to OWEB from the 2022 legislative session. Staff requested approval to amend OWEB's spending plan to include the new funding and to reflect the cost of administering drought programs received in the December 2021 special legislative session. *Action item.*

Mark Labhart moved the board amend OWEB's 2021-23 spending plan to reflect the 2022 legislative session General Fund allocations and modifications to the drought relief and recovery line items, and delegate authority to the Executive Director to distribute the legislatively directed 2021 post-wildfire recovery funds through appropriate agreements with

an award date of April 4, 2022. Jamie McLeod-Skinner seconded the motion. The motion passed unanimously.

G. Fall Open Solicitation Grant Offering Board Awards (Audio = 2:10.24)

Grant Program Manager Eric Williams and OWEB Regional Program Representatives provided background information on the Fall 2021 Open Solicitation grant offering. *Action item*.

Barbara Boyer moved the board approve the staff funding recommendations as described in Attachment D to the Fall 2021 Open Solicitation Grant Offering staff report, with an award date of April 26, 2022. Meg Reeves seconded the motion. The motion passed unanimously.

H. FIP Effectiveness Monitoring – Post FIP Reporting Funding Request (Audio = 5:18.51)

Board and Legislative Policy Coordinator Eric Hartstein and Conservation Outcomes Coordinator Audrey Hatch requested the board approve funding to support a pilot project to track progress towards ecological outcomes following the final biennium of funding under the OWEB Focused Investment Partnership initiative. *Action item*.

Meg Reeves moved the board award up to $50,000 from the Focused Investment Effectiveness Monitoring line item in the 2021-23 spending plan to support a post-FIP reporting pilot project, and delegate authority to the Executive Director to distribute the funds through appropriate agreements with an award date of April 26, 2022. Liza Jane McAlister seconded the motion. The motion passed unanimously.

I. Board Approve Receipt of the BLM Funds (Audio = 5:49.08)

Business Operations Manager Courtney Shaff requested the board proactively approve receipt of up to $10 million from the Bureau of Land Management for aquatic restoration and technical assistance projects over the next five years. *Action item.*

Mark Labhart moved the board proactively approve receipt of up to $10 million from the Bureau of Land Management for aquatic restoration and technical assistance projects over the next five years, and delegate authority to the Executive Director to distribute funds through the appropriate agreements with an effective date of May 1, 2022. Barbara Boyer seconded the motion. The motion passed unanimously.

The meeting was adjourned at 2:02 by Co-Chair Liza Jane McAlister.

Wednesday, April 27, 2022

The meeting was called to order at 10:00 by Co-Chair Barbara Boyer.

J. Director and Staff Updates (Audio = 0:01.19)

Executive Director Lisa Charpilloz Hanson and staff updated the board on agency business. *Information item.*

K. Post Fire Recovery Update (Audio = 0:34.22)

Fire, Klamath, and Drought Programs Manager Renee Davis provided an update about multiple post-fire recovery grant programs being administered by OWEB during the 2021-2023 biennium and reviewed a flow chart that displays the steps involved in standing up a new grant program. *Information item*.

L. Crooked River Watershed Council – Opal Springs Virtual Tour (Audio = 1:05.53)

Partnership Coordinator Denise Hoffert and Crooked River Watershed Council Executive Director Chris Gannon provided an update on the project accomplishments to date at the Opal Springs Dam Volitional Fish Passage Project. This presentation summarized the restoration actions completed, initial monitoring results, and lessons learned. *Information item.*

M. Public Comment (Audio = 1:42.54)

This time was reserved for the board to hear public general comment and review the written public comment submitted for the meeting. The board heard public comment from Network of Oregon Watershed Councils Executive Director Vanessa Green, Oregon Conservation Education and Assistance Network President Cynthia Warnock, and Coalition of Oregon Land Trusts Executive Director Kelley Beamer. *Information item*.

N. OWEB Board Climate Resolution Engagement Update (Audio = 2:30.24)

Grant Program Manager Eric Williams, Business Operations Manager Courtney Shaff, Board and Legislative Policy Coordinator Eric Hartstein, and Water and Climate Programs Coordinator Jessi Kershner updated the board about the Climate Resolution public engagement process. *Information item.*

O. Review of 2023-2025 Agency Request Budget and Policy Options Package (Audio = 2:43.31)

Executive Director Lisa Charpilloz Hanson and Deputy Director Stephanie Page requested board feedback on a summary of Policy Option Packages for the 2023-2025 Agency Request Budget. *Information item.*

P. General Public Comment (Audio = 3:19.38)

This time was reserved for the board to hear public general comment and review the written public comment submitted for the meeting. No public comments were made at this time. *Information item*.

Q. Other Business (Audio = 3:20.35)

This item was reserved for other matters that came before the board. *Information item.*

The meeting was adjourned at 1:36 by Co-Chair Barbara Boyer.

July 26 & 27 2022 OWEB Board Meeting

Written Public Comments
Received by July 12, 2022

Item C:
Network Of Oregon Watershed Councils

Item E:
Ken Bierly
City of Lakeside

Item F:
Coalition of Oregon Land Trust

NETWORK of OREGON WATERSHED COUNCILS

July 11th, 2022

To: The Oregon Watershed Enhancement Board (OWEB) Board of Directors

From: Vanessa Green, Executive Director, Network of Oregon Watershed Councils (NOWC)

Re: Plans for Summer/Fall Legislative Tours

Dear Members of the OWEB Board,

The purpose of this letter is to provide an update on some key NOWC activities that will take place this fall, supported by OWEB's Oregon Conservation Partnership (OrCP) Technical Assistance Grant (222-8006-19999). The grant supports NOWC and our OrCP partners to coordinate targeted site tours for federal/tribal/state/county/local elected officials, federal/state agency representatives, conservation partners, and key stakeholders.

The NOWC tours broadly showcase the roles watershed councils play in successful conservation and restoration across Oregon, establish familiarity, and build relationships. Each year, watershed councils can volunteer to host a tour, and NOWC selects featured projects based on a recommendation from our Government Relations Committee and approval by the NOWC Board. We aim to choose projects which can serve as hallmark examples and thus uplift watershed councils statewide. We also aim to feature projects that align with emerging legislative priorities so that elected officials might consider their experience with us as they conduct their work.

This September and October (exact dates TBA), NOWC plans to coordinate three tours. We'd like to describe them below and invite you to join us, if you are able!

- Early September: McKenzie Watershed Council (Region 3). This tour will be co-sponsored by OrCP parter Oregon Association of Conservation Districts (OACD)
    - We will tour private property enrolled in the Pure Water Partners program, which has benefited from seasoned collaborative efforts among conservation partners, including EWEB, the McKenzie River Trust, and the Upper Willamette SWCD. We will visit sites affected by the 2020 Holiday Farm wildfire and learn about the importance of

landscape-scale restoration to mitigate the effects of climate change, including riparian restoration, erosion control, fuels reduction, invasive vegetation control.
    - We will also tour the Finn Rock Reach – this property is preserved by McKenzie River Trust which partners with McKenzie Watershed Council on restoring valley bottom floodplains to Stage 0/8 conditions. We will learn about on-going projects that have improved habitat, water quality, and flood mitigation, and the 5-10 year plan to implement 5-8 additional large-scale projects.

- Late September – Coos Watershed Association (Region 2), in partnership with other coastal councils, TBA. We will visit one or more Tide Gates on the southwest coast, to discuss the opportunities and complex challenges associated with improving or replacing these aging structures in a coordinated way along many of Oregon's coastal estuaries. We will discuss inter-agency and inter-organizational efforts to implement projects that have already been designed.

- Late September/early October: North Fork John Day Watershed Council (NFJDWC) (Region 6)
    - We will visit the headwaters of Rudio Creek, critical habitat for Chinook salmon and ESA listed Mid-Columbia steelhead. We will learn about natural water storage opportunities in Oregon's high alpine meadows. We will also learn about climate-change related issues such as extended drought and lodgepole encroachment. This tour will highlight the outcomes that are possible through the "Stewardship Planning Framework", a project-by-project roadmap that links all of NFJDWC's restoration activities into a landscape-scale plan. The tour will also feature the benefits of long-term collaborations with the Monument SWCD, BLM, ODFW, the Freshwater Trust, and other conservation partners.

Thank you, and warm regards – we hope to see you out in the field soon!

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Thoughts on Focused Investments and Funding for Ecological Outcomes

Ken Bierly June 2022

The following are thoughts from ongoing large scale restoration efforts and previous large scale funding efforts by OWEB and others. They cover what I see as significant topics that affect the ability to make headway on restoration at scale. The Special (now) Focused Investment Partnership effort is a significant start in targeting specific ecological targets and dedicating funding over a more protracted time than usual funding cycles. My thoughts are informed by experience over more than a decade and a half and with a foundation in the science of larger scale restoration.

Restoration Response, Knowledge Development, and Scale

A recent publication about the restoration of the Lower Columbia River Estuary (LCRE) (Littles, et al., 2022)[1] Accounts for a nearly 20-year restoration effort and identifies three stages (Foundational, Emerging, and Maturing). For the first 8 years the effort was characterized as Foundational; working on basic ecological research, critical uncertainties, system classification, and cumulative effects methods development. While the paper focuses on adaptive management the lesson of the need to develop foundational information from basic ecological research and research to address critical uncertainties is very instructive. This in a system that has been the subject of nearly 5 decades of research and management funding supporting two dedicated programs: 1) Columbia River Estuary Study Task Force (1974-present); 2) Lower Columbia River Estuary Partnership (1995-present). These programs are supplemented by Bonneville Power Administration, Army Corps of Engineers, NOAA Fisheries, and EPA funding creating a strong learning environment with feedback mechanisms and retargeting lessons for directing restoration actions. The Little et al. (2022) study documents the ability to build restoration projects to scale and focus on critical areas and processes through integrated learning and small projects. The experience from the LCRE clearly documents that it took at least 14 years to reach a mature stage necessary to take on larger, more complex projects.

An additional publication on larger scale restoration recounts the lessons learned from nearly complete tidal marsh restoration in the Salmon River Estuary (Flitcroft et al., 2016)[2]. The restoration efforts spanned more than 34 years and included the learning from graduate students that provided critical insights into the functions of the estuarine marsh ecosystem that shaped the restoration efforts leading to a new understanding of the critical nature of the estuarine environment to a variety of species. The estuarine restoration effort was partially funded by OWEB with matching funds from the Coastal Wetlands grant program of the USFWS through OWEB. The U. S. Forest Service and the local watershed council worked together and developed an important "lessons learned" document.[3]

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[1] Littles, Chanda, Jason Karnezis, Katie Blauvelt, Anne Creason, Heida Diefenderfer, Gary Johnson, Lynne Krasnow, and Phil Trask. 2022. Adaptive management of large-scale ecosystem restoration: increasing certainty of habitat outcomes in the Columbia River Estuary, U.S.A. Restoration Ecology doi: 10.1111/rec.13634

[2] Flitcroft Rebecca A., Daniel L. Bottom, Karen L. Haberman, Ken F. Bierly, Kim K. Jones, Charles A. Simenstad, Ayesha Gray, Kami S. Ellingson, Erin Baumgartner, Trevan J. Cornwell, and Lance A. Campbell. 2016. Expect the unexpected: place-based protections can lead to unforeseen benefits. Aquatic Conservation: Marine and Freshwater Ecosystems. 26 (Suppl. 1): 39–59

[3] Ellingson K, Ellis-Sugai B. 2015. Restoring the Salmon River Estuary: journey and lessons learned along the way

Lessons

What both of these reviews of restoration implementation document is that connecting learning about the changes from restoration efforts and building basic understanding of ecological processes and dynamics is important for large scale restoration and recovery. These systems are relatively well studied with focused reviews of estuarine ecology by scientists in the 1960's and 1970's as Oregon was developing their Coastal Management Program. The fact that both efforts included basic research that revealed previously unknown relationships between organisms and the habitats that support them reveals a critical need for both basic research and critical uncertainty research is necessary for large scale restoration efforts.

The long-term restoration efforts in the Columbia River Estuary and Salmon River Estuary also document that large scale restoration requires significant time, significant investment in research, development of relationships with landowners to change land use and dedicated funding to maintain the capacity to develop relationships and identify opportunities for larger scale restoration. The support of two relatively large organizations in the Columbia River Estuary is critical for the progress along with the dedication of significant funding from several federal and state sources. The Salmon River example shows the opportunity where a unique federal law (Cascade Head Scenic Research Act) that vests estuary restoration with the US Forest Service, a role foreign to it. Partnering with estuary funders and the local watershed council created the opportunity for partners to bring resources to accomplish restoration at scale.

Both efforts demonstrate that it takes more than 10-15 years to address meaningful ecological restoration at scale.

OWEB SIP Funding History

In 2007 and 2008 the OWEB Board asked the staff to explore alternative approaches to funding to accomplish large-scale ecological restoration (see sidebar on SIP Purpose and Characteristics). The staff made a number of inquiries and solicited interest. Early interest came from the Deschutes basin where the Deschutes Land Trust, Deschutes River Conservancy, and Upper Deschutes Watershed Council had articulated a vision of necessary activities to support the reintroduction of salmon and steelhead above Round Butte Dam on the Deschutes River. At the same time a Board co-chair was aware that Meyer Memorial Trust was exploring a funding initiative on the Willamette River. OWEB staff had also participated with the National Fish and Wildlife Foundation in developing a "business plan" for restoration of fish habitat in the upper basin in anticipation of the eventual removal of the dams on the Klamath River.

The Board identified six characteristics they wanted to have addressed before consideration of any partnership. They expected any program to address; 1) Higher level ecological outcomes, 2) Sustainability, 3) Strong community partnerships, 4) Efficiencies, 5) Leveraging of Effort, and 6) Ripeness. Throughout 2007 and into 2008 the staff identified the Deschutes Partnership as the first to be recommended for funding and shortly thereafter the Willamette with a growing partnership with Meyer Memorial Trust. There was strong interest inn considering the Upper Klamath, however the partnership was not ready for recommendation by staff until 2012.

2006–2014. Report to Siuslaw National Forest, Corvallis: OR. 54 p.

Deschutes River

In January of 2008 the Deschutes SIP was the first long-term investment made by the OWEB Board. The Deschutes Partnership came out of the FERC relicensing of the Pelton/Round Butte Hydroelectric Project. The three principal partners formulated a plan to address the habitat factors to make reintroduction of salmon and steelhead above Round Butte Dam successful. The partners were part of a "model watershed" program of Bonneville Environmental Foundation and had access to Pelton Funds, mitigation funds from the FERC relicensing, to match OWEB SIP funds. The SIP dedicated funding through the 2013-2015 biennium.

Following the development of the FIP program the Deschutes Partners were funded for the first FIP cycle from 2015-2021.

Willamette River

In March of 2008 the Willamette SIP was approved by the OWEB Board. The Board allocated $6 million to start the program. Later in the year OWEB developed an agreement with Meyer Memorial Trust (MMT) in a funding partnership arrangement (see below). MMT dedicated $1.5 million/year over a 10-year period (2008-2019) for their Willamette Initiative. OWEB funded the Willamette SIP through the 2013-2015 biennium. In 2012 the Willamette partnership added $500,000 per year in fish mitigation funding from Bonneville Power Administration.

The Willamette Initiative was composed of two parts; a mainstem focus on "anchor habitats" and a tributary focus of "model watersheds". MMT led in convening partners and potential partners and supporting the development of tools and knowledge by engaging critical science (cool water refuges, geomorphic processes, etc.) and developing tools for measuring impact (Slices) and evaluating potential projects (2-year flood elevation maps). Linking targeted land acquisition

SIP Purpose and Characteristics

SIP Purposes

1. To use OWEB's financial resources to support projects and partnerships at a scale and in a way that might not otherwise happen through the regular grant program.
2. To assure that the larger strategic goals of Measure 66 and of the Oregon Plan are addressed in a concerted fashion that produces significant and thoroughly measurable outcomes.
3. To assure that OWEB is using all the "tools" available to take full advantage of the funding opportunity presented by the Measure 66 funds between now and the potential expiration date of Measure 66 in 2014 – just seven years from now.
4. To reach across organizational and jurisdictional lines to forge partnerships capable of accomplishing big outcomes.
5. To collaboratively provide the "missing pieces" necessary to boost existing partnerships with outstanding ideas along to the implementation stage.
6. To explore new ways to provide funding assistance to worthy watershed enhancement projects while at the same time assuring that the regular OWEB capital grant program will be robustly funded and will continue to be the main focus of the agency's restoration and acquisition investments.

SIP Project Characteristics

Special Investments Partnerships grants will fund projects that are similar in many ways to those routinely handled by OWEB's "regular" capital grant programs. For example, SIP projects will:

- Address major limiting factors for watershed and habitat health.
- Implement major restoration/protection priorities for the locality in question.
- Support comprehensive projects with clear objectives, clear work plans, and definite timelines.
- Act to prevent species and/or watershed functions from being lost or threatened.

with large-scale restoration became an important approach in the Willamette.

In 2012 the Willamette Initiative was awarded the Thiess International RiverPrize, considered the Nobel Prize for river restoration. Under the 2015 FIP program the Willamette program was funded for three additional biennia (2015-2021).

The Willamette Restoration Initiative

An instructive example of an alternative approach to large scale, long-term funding for ecological outcomes is exemplified by the Meyer Memorial Trust (MMT) Willamette Restoration Initiative (WRI). The WRI was built on seven principles; 1) Encourage geographic focus at a "meaningful, manageable" scale, 2) Recognize and incorporate social and institutional factors, 3) Move from responsive to proactive grantmaking, 4) Provide flexible funding, 5) Adopt an experimental mindset, 6) Encourage candor, and 7) Make a long-term commitment. MMT committed $1.5 million each year for 10 years to the WRI.

The MMT identified the importance of using local-based groups to help address the issue of river basin conditions but that there was little focus or coherence among the locally based organizations. Recognizing that "a substantial part of the problem stems from the mismatch between the capacity of many local organizations and the scale of the restoration challenge." The MMT recognized that there needs to be a change both at the local level and at the funder level to address this mismatch. "In short, the situation in the Willamette Basin exemplifies the mismatch between the magnitude of the restoration challenge and the local organizational capacity needed to achieve collective environmental impact at a large scale. If funders hope to reverse the trajectory of change in ecosystem health, whether at the local, regional, or national level, we have to change our approach to grantmaking."

Wiley et al. (2013)[4] concludes: "The importance of making a long-term commitment when trying to address large-scale ecosystem restoration cannot be overstated. Moving the needle in these systems requires change, whether in agency behavior, funding practices, or farming methods; such changes require cultural shifts, and cultural shifts take time. Small improvements in land and water conditions aggregate and interact slowly and may not be detectable for many years." They state: "We believe at least a decade of funding is needed to develop the organizational capacity and critical mass of restoration projects needed to reverse the trajectory of change in many watersheds." The authors further state: "…we believe that without the application of new approaches (and the assumption of some risk on our part) it is more likely that status quo funding methods will generate limited ecological benefit in this large and complex river system."

The authors state: "Partnerships are critical to success but quite challenging to sustain, especially over the course of a ten-year initiative. In the most effective partnerships, different players bring different assets to the table and work to apply them to shared priorities in complementary ways. For funders, effective partnerships are often hindered by differing priorities, the desire to maintain control of individual grant reviews, and the sometimes-lengthy process for making strategic decisions. Among grantees, a strong loyalty to place and organizational independence, and a history of competition for funds, make it difficult to establish and maintain support for a common agenda. Overcoming these

[4] Wiley, Pam, Ken Bierly, Todd Reeve, and Kendra Smith. 2013. When Local Solutions Aren't Enough: A Strategic Funding Partnership to Restore a Large River System. The Foundation Review 5(1):89-104.

obstacles takes real time and effort and requires partners to learn about and respect each other's limitations."

One of the approaches used by the MMT was to solicit interest for "model watersheds" to participate in the initiative. Each entity that submitted a letter of interest was awarded a stipend ($5,000) to work with Bonneville Environmental Foundation (BEF) to develop a funding proposal that included a monitoring program to develop consistent documentation of accomplishments. Once model watersheds were selected MMT and BEF worked with each model to develop a work plan for capacity support, project development, and implementation.

Upper Klamath River

In 2012 OWEB awarded the Upper Klamath River partners SIP funding to partner with the work of the National Fish and Wildlife Foundation strategy for the Upper Klamath. The SIP funding lasted for two biennia (through the 2013-2015 biennium).

Lessons

The SIP program was a proof of concept for what became the FIP program. It demonstrated that long-term commitment for identified restoration outcomes could work. The effort was fortunate to partner with a private non-profit (MMT) that was exploring the same question. Some of the primary lessons learned included the importance of having clear goals, having some monitoring methods to be accountable, the significant importance of having strong leadership and partner relationships, and the central importance of support for the capacity of the organizations to make a long-term commitment.

OWEB FIP Program Development

In January of 2014 OWEB developed "a definition, criteria categories and a solicitation approach for Focused Investments" that included board identification of ecological priorities, Strategic Action Planning requirement, Partnership Capacity review, and application review process. This approach was approved at the July 2014 Bord meeting scheduling the identification of OWEB Focused Investment Partnership Ecological Priorities in late 2015, early 2015 and following the solicitation process approved. The FIP process was adjusted and funding for "Capacity Building" was approved at the October 2014 Board meeting. In January the OWEB Board was presented with the 42 suggested ecological priorities for the FIP program organized by staff into 12 "themes". At the April 2015 Board meeting OWEB adopted seven priorities: 1) Sagebrush/Sage-steppe Habitat, 2) Oregon Closed Lakes Basin Wetland Habitat, 3) Dry-Type Forest Habitat, 4) Oak Woodland and Prairie Habitat, 5) Coastal Coho Habitat and Populations, 6) Inland Aquatic Habitat for Native Fish Species, and 7) Coastal Estuaries. After a phase I application review, 9 of the 12 submitted FIP proposals were invited for full application submittals. In January 2016 OWEB funded 8 "FIP Capacity Building" grants and 6 FIP Implementation Projects; 1) Deschutes Partnership, Willamette Partnership, 3) Harney Basin Wetlands Initiative, 4) Oregon Sage Grouse All Counties, 5) Ashland Forest all-lands Initiative, and 6) Upper Grand Ronde Initiative.

In July of 2016 OWEB approved staff review of capacity building grants rather than FIP subcommittee of the Board, replaced the letter of intent with consultation with staff, and a revised schedule for reviewing future FIP applications. In July of 2017 OWEB was presented a summary of the report on Partnership Learning Project based on the experience of the initial Capacity Building funding to forming partnerships in eight areas of the state. In October of 2017 OWEB funded four additional FIP Capacity Development grants. OWEB contracted with BEF to develop operational context, theory of change, results chains, and

progress measures for each of the six funded FIPs. In January 2018 the staff recommended changing the grant offering name from "Capacity Development" to "Development FIP" and called "Partnership Technical Assistance" in 2019. In January 2019 OWEB funded 3 additional Development FIP grants.

In January 2019 OWEB staff recommended four additional FIP projects; 1) John Day Basin Native Fish Habitat Initiative, 2) Baker Comprehensive Sage-grouse Threat Reduction, 3) Warner Basin Fish Passage and Habitat Improvement Initiative, and 4) Rogue Forest Restoration Initiative and the Board added the Clackamas Partnership Restoration for Native Fish Recovery as a fifth FIP to be funded for the 2019-2021 biennium. In October of 2019 the OWEB Board refined the ecological priorities specifically for Inland Aquatic Habitat for Native Fish Species based on input from ODFW, and clarifies that Coastal Estuaries includes the historical extent of estuaries. OWEB staff presented the guidance document for Adaptive Management for the FIP program at the October 2019 meeting. In January 2020 OWEB funded 6 additional Partnership Technical Assistance grants.

In June 2020 OWEB postponed the scheduled FIP solicitation. In January 2021 OWEB funded another 6 Partnership Technical Assistance Awards.

Table 1 lists the SIP/FIP funding history of OWEB.

Table 1: SIP/FIP Implementation Projects

FIP Project	Ecological Priority	Funding
Deschutes Partners	Aquatic Habitat for Native Fish	SIP 2008-2015, FIP 2015-2021
Willamette Anchor Habitats	Aquatic Habitat for Native Fish	SIP 2008-2015, FIP 2015-2021
Klamath River Partners	Aquatic Habitat for Native Fish	SIP 2012-2015
Harney Basin Wetlands Initiative	Oregon Closed Basin Wetlands	FIP 2015-2021
Oregon Sage Grouse All Counties	Sagebrush/Sage-steppe Habitats	FIP 2015-2021
Ashland Forests All-Lands	Dry-Type Forests	FIP 2015-2021
Upper Grand Ronde Initiative	Aquatic Habitat for Native Fish	FIP 2015-2021
John Day Basin Native Fish	Aquatic Habitat for Native Fish	FIP 2017-2023
Baker Comprehensive Sage-grouse	Sagebrush/Sage-steppe Habitats	FIP 2017-2023
Warner Basin Fish Passage	Aquatic Habitat for Native Fish	FIP 2017-2023
Rogue Forest Restoration Initiative	Dry-Type Forests	FIP 2017-2023
Clackamas Partnership Restoration	Aquatic Habitat for Native Fish	FIP 2017-2023

When OWEB created the Capacity Development/Development FIP/FIP Technical Assistance grants they created an extensive field for competition for FIP implementation projects. Table 2 identifies the FIP Technical Assistance grants with the ones that led to successful FIP implementation awards highlighted

Table 2: FIP Technical Assistance Grants

FIP Technical Assistance	Ecological Priority	Funding
Siuslaw Coho Partnership	Coastal Coho	2015-2017
John Day Basin Partnership	Aquatic Habitat for Native Fish	2015-2017
Wild Rivers Coast Estuaries	Coastal Estuaries	2015-2017
Clackamas Partnership	Aquatic Habitat for Native Fish	2015-2017
Warner Basin Aquatic Habitat Partnership	Aquatic Habitat for Native Fish	2015-2017
Oregon Central Coast Estuary Collaborative	Coastal Estuaries	2015-2017

Wallowa Fish Habitat Restoration Partnership	Aquatic Habitat for Native Fish	2015-2017
Umpqua Basin Partnership	Aquatic Habitat for Native Fish	2015-2017
East Cascades Oak Partnership	Oak Woodland and Prairie Habitats	2017-2019
Willamette Valley Oak Prairie Cooperative	Oak Woodland and Prairie Habitats	2017-2019
Klamath Siskiyou Oak Network	Oak Woodland and Prairie Habitats	2017-2019
Hood River Watershed Strategic Action Plan	Aquatic Habitat for Native Fish	2017-2019
Intertwine Alliance Oak Prairie Working Group	Oak Woodland and Prairie Habitats	2019-2021
Salmon Superhighway	Aquatic Habitat for Native Fish	2019-2021
Pure Water Partners	Aquatic Habitat for Native Fish	2019-2021
Wallowa County Annual Invasive Grass Partnership	Sagebrush/Sage-steppe Habitats?	2021-2023
Siuslaw Coho Partnership Capacity	Aquatic Habitat for Native Fish	2021-2023
Upper Grande Ronde River Watershed Partnership	Aquatic Habitat for Native Fish?	2021-2023
Supporting the Emerging Partnership of the Willamette Valley Oak Prairie Cooperative	Oak Woodland and Prairie Habitats	2021-2023
Advancing the Partners of the North Santiam	Aquatic Habitat for Native Fish	2021-2023
Upper Deschutes Partnership	Aquatic Habitat for Native Fish	2021-2023

The interest in improving Aquatic Health for Native Fish far outweighs the other ecological priorities. This is demonstrated both in funded FIP Implementation projects (7 out of 12) and FIP Technical Assistance (12 out of 21). A partial reason for this is past funding for watershed assessments, Salmon strongholds, coho business plans and other tools to help focus on recovery of listed species as well as recovery plans and ODFW restoration prioritization. OWEB has provided significant funding through the Governor's office to support improved knowledge about sage grouse habitat. The significant knowledge base about stream health for native fish skews the scales towards effective native fish habitat initiatives.

Observation from FIP History

A very interesting observation is that neither the Deschutes nor the Willamette mainstem partners submitted applications for the current FIP Implementation funding. Both partnerships have undergone significant change in leadership. The Deschutes lost the three original leaders that collaborated from prior to the SIP in 2008 and the Willamette lost the convening and "cheerleading" of MMT and a key staff person from the Nature Conservancy that coordinated the program. It is telling that a stable form of leadership is necessary to ensure the complex working relationships between the partners and with OWEB to ensure that the technical review and grantmaking procedures with OWEB are followed. It appears that a decade may be a limit for focus of partnership groups that are working together without some form of convening partner. Having an organization that is responsible for the collaboration like the High Desert Partnership or the role MMT played in the Willamette Initiative adds greater stability and allows the partners to focus on their roles in the FIP.

Lessons from Long Term FIPS

Two of the SIP/FIP projects have been funded by OWEB for more than a decade. The experience from the Deschutes and Willamette mainstem/model watershed projects should be instructive on the duration and funding needs for effective implementation.

Concluding Observations

- There appears to be a strong, common desire to address ecological priorities at scale by OWEB.
- The agency has experimented with different approaches to funding to accomplish the outcomes desired.
- There has been a significant effort to make the FIP process more uniform but has resulted in major changes over a relatively short time 2015-2021 when the approach to the required Strategic Action Plan has completely changed, guidance on Adaptive Management, and Monitoring were developed.
- With the funding of many more FIP Technical Assistance than can be supported by FIP implementation you have created a highly competitive program which appears to be counter to the "Partnership" approach it started with.
- There is no preference to continue funding for projects beyond the first six-year commitment even given the preponderance of evidence from others that at least a decade is necessary to make significant progress.
- The reversion to a competitive grant program has the likely outcome of failing to meet the desired outcomes of measurable progress on the ecological priorities across the state.
- There is no consideration of the relative depth of information on ecological processes and management options across priorities.
- OWEB has a long history of administering competitive grant offerings for many categories of funding. It appears this experience is taking over the partnership emphasis attempted to be built over the last 16 years.
- Both FIP projects that were funded for two cycles; Deschutes Partners and Willamette Initiative (SIP-FIP) did not reapply for a third.

Suggestions

- Balance the offerings for FIP Technical Assistance with the likelihood of FIP implementation granting. Try to reduce the competitive element for the program.
- Reconsider the approach of letter of interest before either funding a FIP Technical Assistance or FIP Implementation that reduces the effort on the part of the applicant.
- Give some preference to continuing FIPs for two cycles (12 years) to allow for the accomplishment of larger-scale outcomes.
- Look at the program as a true partnership with the desire to achieve outcomes on difficult ecological priorities helping grantee partnerships accomplish their goals.
- Recognize the significant difference in supporting scientific understanding and management emphasis among the ecological priorities.
- Review the history of the development of the partnership programs and help the Board understand how the agency got to where they are.

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When Local Solutions Aren't Enough: A Strategic Funding Partnership to Restore a Large River System

Pam Wiley, M.S., Willamette River Initiative, Meyer Memorial Trust/Tides Center; Ken Bierly, M.S., Oregon Watershed Enhancement Board; and Todd Reeve, M.S., and Kendra Smith, M.S., Bonneville Environmental Foundation

Keywords: Collective impact, watershed restoration, funding partnership, Willamette River, Meyer Memorial Trust, Bonneville Environmental Foundation, Oregon Watershed Enhancement Board, watershed council, environmental restoration

Introduction

Funders collaborate in many ways to increase the impact of their grantmaking on complex societal problems. They come together as affinity groups to learn from subject-matter experts and one another. They may also pool resources to address common priorities or co-fund campaigns that are difficult for institutions acting alone to support at a meaningful level.

Until recently, however, relatively few grantmakers have entered into formal strategic partnerships with other funders and stakeholders aimed at achieving specific goals and objectives in a defined area of need. Such "collective impact" approaches to catalyzing large-scale social change, as described by Mark Kramer and John Kania in the Winter 2011 issue of the *Stanford Social Innovation Review* and other publications, have great potential to improve outcomes by aligning stakeholders from philanthropy, nonprofits, business, and government around common priorities, strategies, and measures of success. To date, funder experimentation with the collective impact model has focused largely on examples from human services, public health, and education, but a modified collective impact framework may also be suited to tackling complex, large-scale environmental challenges. In Oregon, a network of public and private funders, their grantees, and key partner organizations are experimenting with collective impact principles in a 10-year collaboration aimed at improving the health of the Wil-

Key Points

- Freshwater ecosystems are increasingly imperiled, and funders, nongovernmental organizations, community groups, and government agencies around the world are working to restore ecological function and resiliency to these critical resources.
- What does it take to structure, support, and implement truly effective, broad-scale watershed restoration? This article will describe the unconventional funding strategies catalyzing collective impact across multiple restoration groups working in a diverse set of watersheds and share the challenges and opportunities encountered while implementing these strategies.
- In Oregon, an experimental 10-year collaboration aimed at improving the health of the Willamette River system is being led by the Portland-based Meyer Memorial Trust with support from the Bonneville Environmental Foundation and the state-administered Oregon Watershed Enhancement Board. These groups are providing the "scaffolding" and supporting the distributed leadership needed to reverse the trajectory of change in the Willamette by aligning their grant programs around shared, science-based restoration priorities; identifying and filling key capacity needs of local watershed groups and land trusts; and facilitating more and better collaboration in restoration planning, implementation, and monitoring.

FIGURE 1 Overview of Watershed Restoration Terms and Tools

Watershed Restoration Basics

In the context of ecosystems, the term "restoration" refers to managing the physical, chemical or biological characteristics of a particular geographic area or site with the goal of returning natural/historic functions such as filtering surface water to remove pollutants, absorbing floodwaters, or providing habitat for diverse fish and wildlife species. Most often, the term is used in conjunction with specific habitat types like wetlands or riparian areas whose functions have been altered as a result of human development.

A 1992 National Research Council report defined restoration as "the return of an ecosystem to a close approximation of its condition prior to disturbance... [T]he goal is to emulate a natural, functioning, self-regulating system that is integrated with the ecological landscape in which it occurs." In many cases, however, return to a predisturbance condition is impossible -- data documenting original conditions don't exist, or human activities have changed land and water conditions and connections so extensively that pre-disturbance conditions would no longer be compatible with surrounding ecosystems and landscapes.

The success of environmental restoration initiatives depends on many factors, including site-specific ecological conditions, social consent, legal authority, and the availability of scientific knowledge, technical expertise, and adequate funding (Caldwell 1991). Additionally, because ecological systems are complex and it may take decades to fully demonstrate the effects of restoration and other management activities, seeing or measuring results of restoration efforts may take a long time.

For more information see: http://water.epa.gov/type/watersheds/archives/chap1.cfm

Stream Restoration Terms Used in This Article

- ***Watershed*** - the land area that drains water to a particular stream, river or lake.
- ***Restoration*** - management of the physical, chemical, or biological characteristics of a geographic site or feature with the goal of returning natural/historic functions; often used in reference to water-related places such as streams, riparian areas, or wetlands. In reference to watersheds, restoration means improving current land and water conditions to restore degraded habitat and provide long-term protection of water resources for the benefit of aquatic life and human health and communities.
- ***Watershed restoration*** - a flexible framework for managing water resource and habitat quality and quantity within a specific watershed, usually including stakeholder involvement and land and water management actions supported by sound science and appropriate technology.
- ***Riparian*** - relating to, living on, or located on the banks of a watercourse such as a stream, river, or lake.
- ***Run-off*** - the part of precipitation that flows off the land and may enter streams and rivers.

Stream and River Restoration Tools

Tools used by river restoration practitioners to return ecosystems to more natural, sustainable conditions include reconfiguring streambeds to increase habitat complexity; removing or replacing man-made structures like small dams and culverts to improve connectivity and allow upstream and downstream passage for migratory fish; placing stumps, logs, boulders etc. in streams to create pools and riffle habitat and improve the structure and composition of the streambed; re-establishing vegetation in the riparian corridor with species (usually native) well-suited to current land and water conditions; and installing structures and plantings to control pollutant-bearing runoff from roads, parking lots, and farm fields.

lamette River system. In 2012, the International River Foundation awarded the Willamette River collaboration with the Thiess International Riverprize for best practices in river management.

The goals of this article are to (1) describe the rationale behind the nontraditional funding initiative developed by the Oregon partners, (2) describe the actions and strategies being deployed, and (3) identify key challenges and lessons learned to date, with specific reference to the collective impact framework. In sharing our approach, we seek feedback that will help us refine and improve our own efforts. We also hope to encourage other funders to experiment with unconventional approaches to addressing complex environmental problems.

The Problem

As ever-greater demands are placed on freshwater resources, government agencies, nongovernmental organizations, and community groups are pursuing a variety of approaches to protect and restore river systems and the landscapes they drain – usually referred to as "watersheds" or "basins" (see Figure 1 for an overview of watershed restoration terms and tools). Top-down policy or regulatory approaches, while desirable for their consistency and enforceability, can be a poor fit for physically, demographically, and jurisdictionally complex watersheds. Such solutions frequently encounter resistance at the local level. Moreover, evidence suggests that locally endorsed, collaborative initiatives may provide one of the best means for addressing restoration and management challenges at the watershed or ecosystem scale (Bonnell and Koontz, 2007; Moseley 1999; Born and Genskow 2001). As a result, governments at all levels and many communities are turning to local solutions to stream and river restoration challenges.

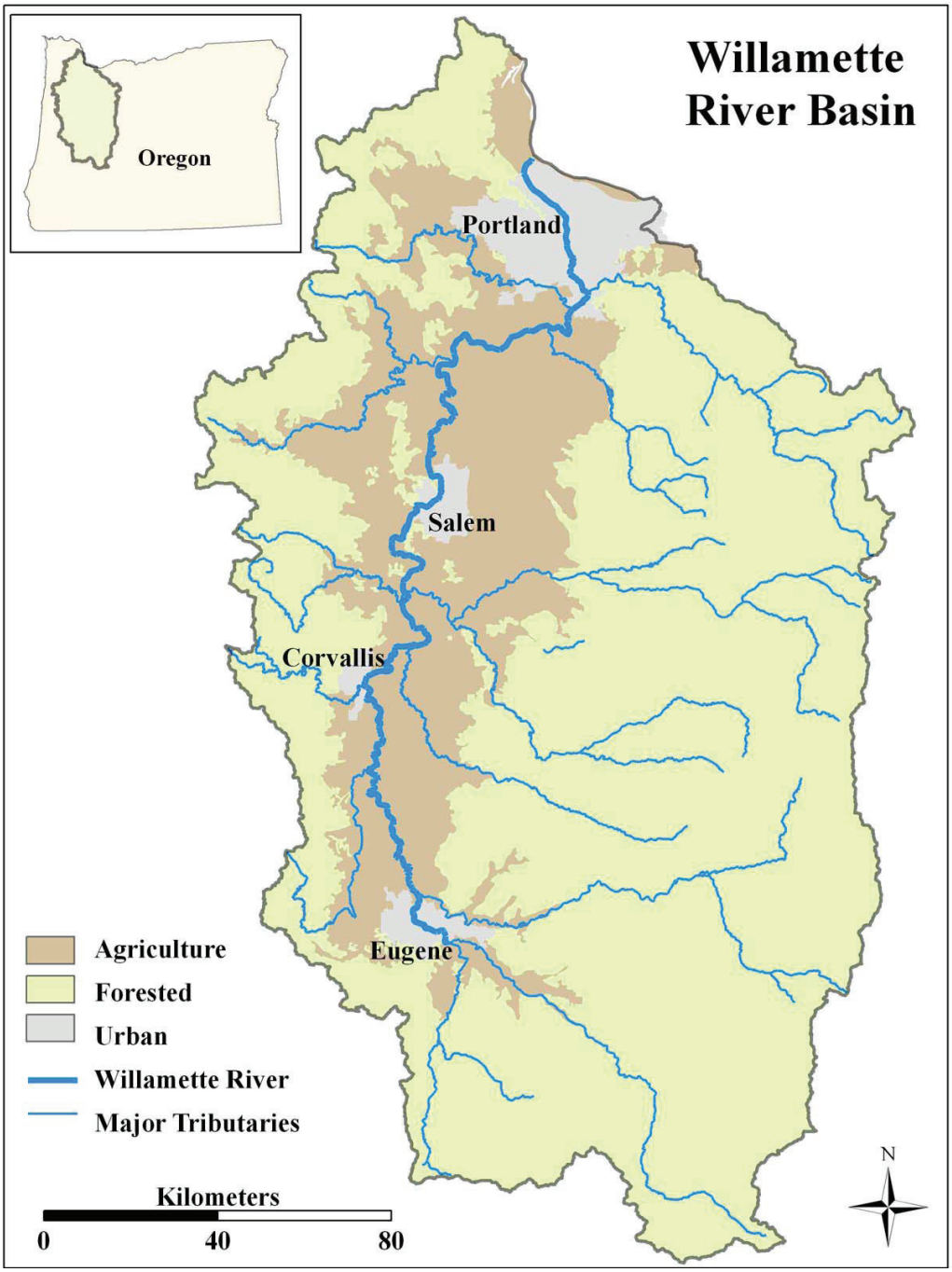
It has been estimated that public and private funders invest an average of $1 billion each year on river and stream restoration (Bernhardt et al., 2005), and local efforts have produced thousands of individual restoration projects across the U.S., such as fencing to keep livestock out of streams, removal of small dams, and tree planting in streamside areas. However, as yet there is little evidence that these projects have produced outcomes on the scale needed to reverse hundreds of years of environmental damage. Water quality in many streams remains impaired, and populations of important species like Pacific and Atlantic salmon remain at risk. With such significant investment and so many projects being implemented, why haven't results demonstrated widespread ecological improvement?

Based on our collective years of experience providing grants to watershed restoration projects across the Pacific Northwest, we believe a substantial part of the problem stems from the mismatch between the capacity of many local organizations and the scale of the restoration challenge. This mismatch is especially pronounced in large, heavily altered watersheds where the legacy of land-use impacts presents local groups with a daunting suite of restoration challenges. These challenges come from historic and ongoing economic uses (logging, grazing, water extraction, mining, urbanization, pollution, and agriculture); public infrastructure (dams, roadways, irrigation facilities); and new challenges (climate change, invasive nonnative species). They occur across watersheds that may span thousands of square miles.

Many of the groups that seek to address these challenges, meanwhile, have no regulatory authority and often possess just a handful of staff and volunteers. A majority depends on relatively small, project-specific grants from local or regional agencies and grantmakers. They struggle to maintain the experienced staff needed to deliver projects at the scale required for detectable ecosystem improvements over the long term. To use the terms of Kramer and Kania, many efforts to improve freshwater resources across large geographies appear to rely on an "isolated impact model" – with the hope that a single organization or a set of isolated organizations may one day grow to expand their impact on a broader scale.

Could a different approach to funding increase the capacity and effectiveness of locally based watershed restoration initiatives? This question is

FIGURE 2 The Willamette River Basin



Map by Connie Burdick.

of great importance; with ever-mounting environmental pressures and the declining ecological health of many large river systems across North America and beyond, there is a critical need for effective restoration at a scale large enough to produce real improvements in water quality, the status of at-risk fish and wildlife populations, and other indicators of watershed health. If voluntary, ground-up approaches are to be part of the solution (and we believe they must), new methods of supporting these groups need to be developed and tested, and funding strategies must be continuously adapted based on measured results.

The Willamette River

In Oregon, a partnership of three grantmaking organizations has developed an integrated strategy to test whether a fundamental change in funding practices can narrow the gap between need and capacity and strengthen the impact of locally led ecosystem-restoration efforts. The focus of this strategy is Oregon's Willamette River Basin. (See Figure 2.)

The Willamette River drains a large watershed (11,500 square miles; a bit larger than Massachusetts) lying between the Coast and Cascade mountain ranges in western Oregon. Diverse indigenous peoples inhabited the watershed for thousands of years prior to European-American settlement, and fur traders exploited the river and its tributaries from the 18th to mid-19th centuries. Drawn by plentiful water, fertile soils, and a mild climate, thousands of pioneers traversed the Oregon Trail to settle in the Willamette Valley. Their impact – and the impact of those who came later – can be seen across the modern landscape in the form of agriculture, urban and industrial development, and transportation and other public works. (See Figure 3.) Today, the valley contains some of Oregon's most productive farm and forestland, and 20 of Oregon's 25 largest cities.

Numerous studies and reports have documented the changes in the health of the Willamette River as a result of this population growth and development (Hulse, Gregory, & Baker, 2002; Morlan, Blok, Miner, & Kirchner, 2010; Oregon Progress Board, 2000). The habitats that covered the Willamette Valley prior to settlement have been dramatically altered, and many of the river's natural features have been compromised by human efforts to confine its channel, stabilize its banks, control flooding, and cultivate and develop valley bottomlands.

Studies since the 1990s have confirmed that a variety of pollutants (heavy metals, PCBs, agricultural pesticides, bacteria, nutrients) are still present in the river and its tributaries (Anderson, Rinella, & Rounds, 1996), despite significant progress in reducing pollution from industrial and municipal sources. In 2000, the Environmental Protection Agency identified excessive levels of hazardous industrial contamination in the Portland Harbor and mandated a cleanup effort (with a Superfund designation).

These impacts occur throughout the river system – on the main channel of the Willamette, along its major tributaries, and in smaller streams that feed larger river arteries. The chronic impacts of stream degradation have led to the listing of many Willamette Valley fish and wildlife species, including Chinook salmon, as threatened or endangered under state and federal law.

Addressing these problems is a complicated, expensive, and long-term undertaking, yet there is no basinwide river authority overseeing management and protection of the Willamette. Instead, dozens of organizations operating at varying scales and governance levels are involved in activities that affect the river system.

A number of the groups working to improve environmental conditions in the Willamette Basin are community based. A few are long-established private land trusts, but most are so-called "watershed councils" created as a result of the Oregon Plan for Salmon and Watersheds. The Oregon Plan, adopted by the state in 1997, was developed to avoid listing of coastal salmon runs under the Endangered Species Act by demonstrating that Oregon could reverse fishery declines through voluntary, collaborative restoration efforts. Coupled with approval of a 1998 ballot measure aimed in part at providing reliable funding for improving fish habitat, the plan led to the formation of nearly 100 watershed councils across the state.

FIGURE 3 A Community Along the Willamette River. Surrounding agricultural lands are protected under the state's land use laws.

Photo: Eric Vance, U.S. Environmental Protection Agency

More than 20 such groups operate in the Willamette's watershed, serving a wide range of rural, urban, and suburban sub-watersheds drained by waterways flowing into the river.

The watershed councils in the Willamette Basin vary in size and capacity, but in general are similar to many other local ecosystem restoration groups operating across the U.S. They understand their communities, geographies, and economies, and possess the local connections and credibility to constructively engage landowners and other stakeholders in restoration efforts. However, most funding programs traditionally available to these groups focus on individual projects that address particular habitat types or species, which can lead to widely dispersed restoration activities with dilute impacts. Few funders provide support for comprehensive, long-term watershed restoration planning, or for the crucial up-front work actually needed to develop high-impact projects (e.g. landowner outreach, environmental and real estate appraisals and surveys, project designs). Local groups also commonly lack the technical expertise necessary to manage the large, complex projects needed to address major obstacles to improved ecosystem health.

In short, the situation in the Willamette Basin exemplifies the mismatch between the magnitude of the restoration challenge and the local organizational capacity needed to achieve collective environmental impact at a large scale. If funders hope to reverse the trajectory of change in ecosystem health, whether at the local, regional, or national level, we have to change our approach to grantmaking.

The Willamette Funding Partnership

ThThe institutions involved in the Willamette funding partnership are a private foundation, a state lottery-funded public agency, and a nonprofit

organization with a modest grantmaking program targeting watershed groups. These institutions have differing mandates, grantmaking assets, and organizational capacities.

- The Meyer Memorial Trust (MMT), one of the largest private foundations in the Pacific Northwest, is leading the Willamette funding partnership. Since it began operating in 1982, MMT has awarded more than $600 million in grants and program-related investments to nonprofits based in Oregon and southwest Washington state. In recent years, MMT has supplemented its responsive grantmaking programs with several long-term, strategic funding initiatives designed to tackle some of the most challenging issues facing Oregon, including improving the health of the Willamette River. The foundation awards about $1.5 million annually through its Willamette River Initiative and has invested close to $7 million to date. The initiative is administered in partnership with the Tides Center, with program operations managed as a Tides project and grant funds administered directly by MMT. Mark Kramer's and John Kania's consulting firm, FSG, identified the Willamette River as a key funding opportunity for MMT during a 2007 strategic planning process.

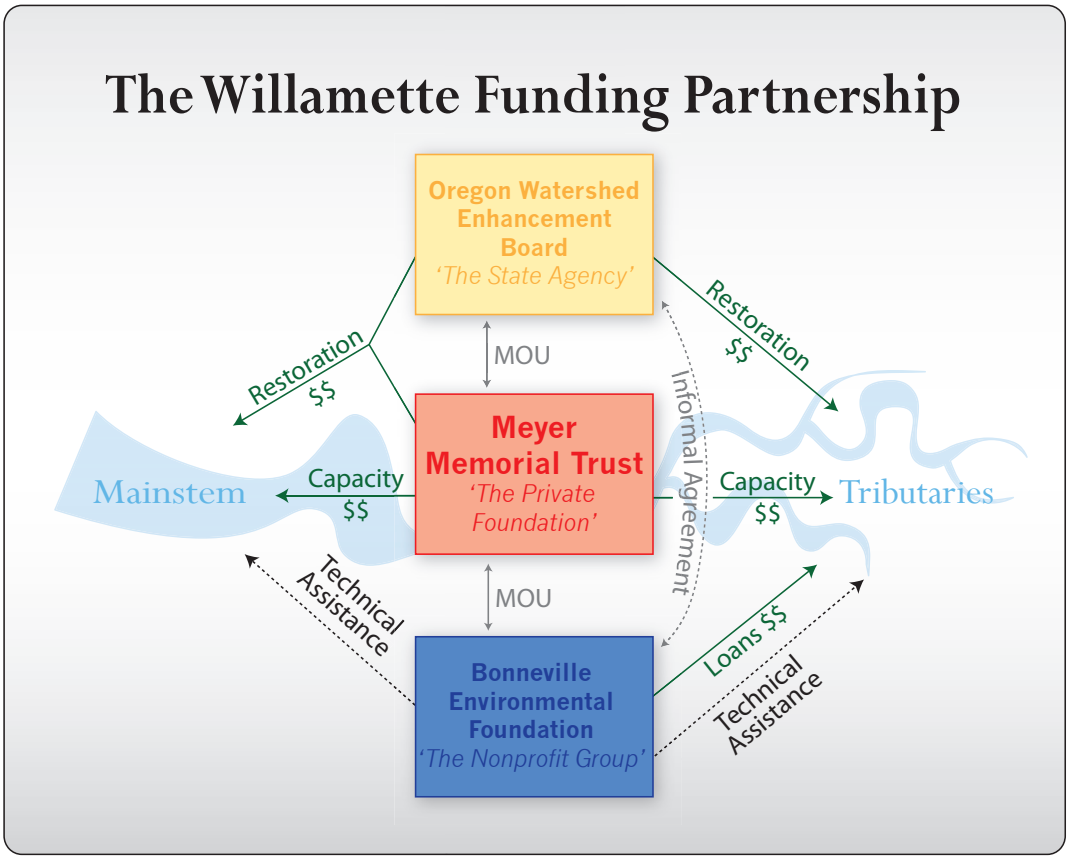
- The Oregon Watershed Enhancement Board (OWEB) is the state agency most closely involved in the Willamette funding partnership. It provides grants to local watershed groups in support of restoring local streams, rivers, wetlands, and natural areas. OWEB's grant funds originate from constitutionally dedicated Oregon Lottery proceeds, federal grants, and salmon license plate revenue. The agency has a biennial grants budget of $50 million to $70 million. A 17-member citizen board, drawn from the public at large, tribes, federal agencies and state government boards and commissions, leads the agency. OWEB grants, most of which are awarded on a competitive basis, support technical assistance, organizational capacity outreach, on-the-ground restoration, and monitoring and evaluation. In 2008, the agency began experimenting with geographically targeted funding programs in selected areas of the state, including the Willamette River drainage basin. OWEB allocated $6 million to the Willamette "Special Investment Partnership" between 2008 and 2010, and an additional $3 million for 2011-2013.

- ThThe Bonneville Environmental Foundation (BEF) is an entrepreneurial nonprofit that develops innovative solutions to pressing freshwater and energy challenges. ThThrough its Model Watershed Program, BEF builds partnerships with local watershed groups and supports the development of long-term, integrated restoration and monitoring strategies. BEF pledges 10 years of funding to each Model Watershed partner, averaging $30,000 annually, along with sustained technical and scientific support to guide the implementation of these comprehensive, results-based watershed-restoration efforts. Funding for the program is provided by theBonneville Power Administration (a regional power marketing agency), foundation grants, and revenue derived from BEF's sale of energy, water, and carbon sustainability products and services to private sector business and corporations. BEF also receives an annual grant from MMT to provide technical and operational support to a number of the Willamette partnership's local grantees.

ThThroughout the rest of this article, MMT is referred to as the private foundation or foundation, OWEB as the public agency or agency, and BEF as the nonprofit.

Five years ago, the private foundation and the public agency were proceeding on separate tracks to develop Willamette-focused funding initiatives. ThThe agency hoped a special focus on the Willamette, based on clearly defined ecological objectives, would trigger funding proposals more closely linked to factors limiting river health than it had received through its regular grants program. ThThe foundation saw an opportunity for private philanthropy to play a catalytic role in the future health of an important feature of Oregon's

FIGURE 4 The Willamette Funding Partnership



Graphic by Cristina Watson, Meyer Memorial Trust/Tides Center.

natural, cultural, and economic landscape. Both groups were already making responsive grants to groups working in the Willamette Basin. Upon learning that they shared an interest in the river, the foundation and the public agency decided to explore whether they might have more impact by working together.

The foundation and the public agency also convened an advisory group of watershed councils and other restoration-focused nongovernmental organizations to explore what it would take to significantly improve the scale and effectiveness of local restoration efforts. The advisory-group process allowed key stakeholders to play a role in setting the goals and laying the groundwork for a new approach.

After reviewing and discussing various approaches to river and watershed restoration in practice in the region, the advisory group recommended that the funders foster and support a "big picture" approach to restoration, including adherence to detailed, long-range restoration plans and rigorous, sustained monitoring of results. They also suggested that the funders set high expectations for grantee performance toward desired outcomes while encouraging adaptation based on results of monitoring and changing conditions, working in close partnership with local groups to supplement and build the organizational capacity needed to succeed. The group recommended that the funders support the initiative for at least seven years, and that they allow flexibility in the use of grant money.

Through the advisory group process, the foundation learned that the non-profit was already practicing many of these principles through its "model watershed" grant and technical assistance program. The foundation began working with the nonprofit to adapt the program to the Willamette, bringing a third collaborator into the funding partnership. (Figure 4 illustrates the relationships among the funding partners and the investments made in the Willamette and its tributaries.)

The three partners formally launched their Willamette River initiative in 2008 with two primary funding strategies, one focused on supporting projects designed to restore important river functions and habitats along the main (or "mainstem") Willamette River, and one aimed at a more holistic, long-term approach to achieving improved watershed conditions at a smaller scale in selected Willamette tributaries.

As the program has evolved over the past four years, so have our strategies and principles. Our current thinking about how grantmakers interested in watershed and other large ecosystem restoration efforts might improve their impact is described below.

Grantmaking Principles

The grantmakers involved in the Willamette funding partnership have come to believe that many traditional approaches to funding environmental restoration – approaches characterized by awarding competitive, short-term grants for site-specific projects – may in fact limit the broader efficacy of watershed restoration programs. Below we describe the seven funding principles that have shaped our experimental approach to improving the scale and effectiveness of restoration in the Willamette, and how we are putting these principles into practice.

Encourage geographic focus at a "meaningful, manageable" scale. Many environmentally focused funding initiatives, both private and government-driven, are attracted by the prospect of conserving large, compelling landscapes and ecosystems. At the same time, grantmakers (especially government funders) feel pressure to distribute grants across many political jurisdictions. As a result, restoration investments are broadly spread across vast states, ecoregions, and watersheds. We agree with Roni et al. (2002) that a more focused approach, where investments and projects are clustered over time – and in places where, for social or ecological reasons, investments are likely to yield improved conditions – offers greater potential benefit for depressed fish and wildlife species. A more focused approach also increases the likelihood that restoration actions will produce detectable results that can be used to assess the effectiveness of past actions and help inform future strategies. Accordingly, in the Willamette, the partners have focused their restoration grants on a discrete set of "anchor habitat" areas along the main channel of the Willamette River and a subset of smaller streams within tributary watersheds. Within these areas, funding priorities address specific ecological objectives based on an array of science-based plans and reports. (ThThe foundation narrowed its target area further by excluding the Portland metropolitan area, where restoration challenges are greater, costs are higher, and multiple other sources of funding exist.)

Recognize and incorporate social and institutional factors. Responding to criticism that their investments lack focus and strategy, some environmental grantmakers have developed species- or geography-specific funding initiatives based largely on ecological criteria. While this is a step in the right direction, we believe that social and institutional factors are also critical to attaining success. Achieving sustainable watershed improvement takes years of community and landowner outreach and engagement, and changes in behavior by both individuals and organizations. Prospective grantees that carry strong science credentials but lack representative and engaged leadership, strong and authentic ties to local institutions and landowners, and deep-rooted community support will be hard-pressed to deliver lasting environmental gains. In the Willamette funding partnership, social and community factors like those enumerated above are carefully reviewed during due diligence and tracked throughout the project. When selecting grant partners, we pay special at-

tention to board representation and engagement, relationships between grantees and key community partners, and the "fit" between the work needed and the proposing organization.

Move from responsive to proactive grantmaking. Much of the funding available for ecosystem-restoration projects is awarded through responsive grantmaking programs. Such grant programs are usually competitive; proposals submitted in a particular grantmaking cycle are compared against each other, ranked, and funded in order until that cycle's budget is exhausted. Our experience suggests that such heavy reliance on responsive, competitive grantmaking to address large-scale restoration challenges is unlikely to fully leverage the collective capacity of funders or their grantees. In addition, "best among submitted proposals" approaches may discourage collaboration because over time they contribute to a culture of competition among applicants. The Willamette River partnership is decidedly more proactive in its approach to grantmaking. Partnership staff is actively involved with grantees, scientists, and other restoration professionals in identifying critical funding gaps. In some cases, we work with organizations as proposals are crafted to ensure the project both achieves the goals of the applicant and contributes to the larger, collaborative Willamette restoration effort. We stay in touch with grantees through multiple means during the grant period, so we are aware of changing conditions and needs.

Provide flexible funding. It can take years for an organization to develop community understanding and support, conduct baseline surveys of local land and water conditions, and obtain the regulatory permissions needed to advance effective watershed restoration. Providing local watershed groups with a modest amount of consistent, flexible funding can greatly improve their ability to develop long-range plans, leverage existing relationships, identify and cultivate projects in critical areas, and generate sought-after ecological improvements. By law, the agency has historically been driven to direct the bulk of its grants to on-the-ground restoration activities. The private foundation, with much greater grantmaking latitude, has focused on the "noncapital" needs described above. ThThe nonprofit, meanwhile, has employed its strong knowledge of the science and practice of watershed restoration, along with periodic small grants and bridge funding, to provide technical assistance and operational support to the watershed councils and other local implementing groups involved in the initiative.

Adopt an experimental mindset. ThThe field of environmental restoration is relatively young, and there remain many questions about the nature and scale of actions required to succeed. Unfortunately, among both grantmakers and grant recipients restoration funding and implementation proceed as if there were certainty regarding what results will accrue from on-the-ground actions and investments – funding many tree-planting projects, for example, without knowing whether, individually, such projects actually lead to improved outcomes for fish, wildlife, or water quality. We believe that successful restoration of large ecosystems is unlikely unless both the funding and restoration communities adopt an "experimental mindset" – one in which the investigational nature of each project or restoration initiative is embraced with an eye toward learning, adapting, and sharing lessons with a broader community. ThThe Willamette funding partners work together on projects aimed at improving understanding, joint learning, shared metrics, and monitoring. ThThe latter is a key advantage of the long-term nature of the partnership, as monitoring over time can detect trends that inform program modifications.

Encourage candor. In order to advance ecosystem-restoration work to a meaningful scale, greater candor is needed among grantees and funders regarding the uncertainty inherent in this work. Unfortunately, there is a disincentive for grantees to critically evaluate and honestly report project outcomes because, traditionally, future funding has been tied to a track record of "successful" projects. ThThis pressure to report only success contributes to a widespread lack of learning, as restoration results are infrequently documented, publicized, or effectively shared to improve restoration practice (Kondolf, 1995; Palmer, Allan,

Meyer, & Bernhardt, 2007; Bash & Ryan, 2002). Though it is hard to gauge, our sense is that we still have a ways to go to achieve truly open and candid relationships with our grantees. We receive mostly positive grant reports, yet based on measured outputs we know that some grantees have made greater progress in landowner recruitment and project implementation than others. On the plus side, with a 10-year program grantees are able to set long-term goals, and we can work together to check regularly for progress and place problems in context. Frequent personal contact improves a sense of accessibility, and practicing candor in those interactions in some cases encourages greater openness from grantees. In the long run, we may learn more from quantitative monitoring data and formal program evaluations (one is currently under way) than annual grant reports.

Make a long-term commitment. It took centuries of Euro-American habitation, significant public investment, and private resource use and extraction to degrade North America's river and stream systems, and it is widely acknowledged that efforts to improve these systems will take decades. In many cases, the ecological outcomes of today's investments may not be detectable until many years from now. Still, few funders – public or private – dedicate funding to support restoration and monitoring activities in one place over the time frames necessary to achieve ecological recovery (Reeve, Lichatowich, Towey, & Duncan, 2006; Kondolf, 1995; Katz, Barnas, Hicks, Cowen, & Jenkinson, 2007). Partly as a result, few watershed-restoration initiatives possess the sustained and flexible resources necessary to carry out science-based, watershed-scale restoration programs (Huntington & Sommarstrom, 2000), much less learn from their successes and failures. We believe at least a decade of funding is needed to develop the organizational capacity and critical mass of restoration projects needed to reverse the trajectory of change in many watersheds. Accordingly, all three funders have committed to a long-term investment – the foundation for 10 years, the nonprofit for 10 years, and the agency through at least 2015 with the intention to continue (as a state agency, OWEB is not able to commit future funds without legislative approval). The combined investment to date is approximately $15 million.

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Beyond Grantmaking: Collective Impact in the Willamette

Historically, river restoration efforts in the Willamette Basin have lacked a common agenda, shared measurement systems, continuous communication, mutually reinforcing activities, or "backbone" support – the five conditions that Kramer and Kania (2011) have identified as necessary to achieving collective impact. The basin may simply be too big and diverse, and its environmental challenges too complex, to be a good fit for collective impact in its purest form. On the other hand, with dozens of agencies, jurisdictions, and nonprofits involved in trying to improve the Willamette's health – and no overarching, government-sanctioned plan or program to guide restoration efforts – the principles of collective impact provide a reasonable framework for fostering better alignment of some of the basin's disparate players and programs. Our experience confirms that at least some collective-impact

principles can help large-scale environmental restoration projects achieve better results.

A common agenda or shared vision is a cornerstone of the collective-impact model, and our grantees and other partners do operate from a set of commonly recognized restoration priorities distilled from several well-respected and relatively recent studies and reports on the Willamette. However, there is no formal, written vision guiding the current enterprise, and we suspect that if we had sought agreement at the outset regarding a specific vision, goals, and strategies, we might still be engaged in a prickly planning exercise. For the Willamette funding partnership, it has been more productive to begin with a lot of listening – along with some strategic grants aimed at building knowledge and relationships – than to ask myriad disparate groups to come to agreement around a common vision and priorities right out of the gate. Though progress has been slow, in recent months stakeholders have expressed interest in collaborating in the development of a shared vision. Rather than beginning our initiative with a plan, we may do better to end with one, provided it is broadly designed and embraced.

We also are making progress toward defining shared metrics of river health for the Willamette. The agency and the foundation have made several grants to university researchers to fill important gaps in information regarding key indicators of mainstem health, and the nonprofit and watershed council grantees have developed a core set of health indictors for the smaller watersheds. This year the foundation will convene a task force to work on shared metrics, with the goal of releasing a Willamette River "report card" in 2014.

The size of the Willamette's watershed presents a challenge to achieving a high level of continuous communication. The many groups with an interest in the river have different priorities, distances across the watershed are great, and time is precious. Nevertheless, we have witnessed growing interest in regular communication, peer-exchange events, and gatherings as our partners recognize how these activities can serve both local priorities and a larger restoration vision. Our experience indicates that it is worth striving to continually facilitate and enhance communication among partners, though achieving a single continuous communication network may not be achievable.

River stakeholders and others have long bemoaned the overlaps and bottlenecks hindering effective, strategic implementation of watershed restoration programs in the Willamette, so the collective-impact principle of mutually reinforcing strategies – where the individual actions of several groups fit into and reinforce an overarching plan for watershed restoration – is very appealing. And, though once again complicated by the scale and complexity of the basin, achieving a more rational institutional landscape is not completely out of reach. Models exist in other, albeit smaller, watersheds. In the Willamette, scaling up may be greatly assisted by some strategic scaling down, and we are witnessing a natural evolution of many local partners into cohorts focused on geographic sub-areas where they are able to discuss mutually reinforcing strategies in a very pragmatic and place-specific way. At the basin scale, major funders are making progress in defining common priorities and discussing how different pots of money can be aligned for greater impact.

To varying degrees, all three funding partners provide "backbone organization" services to the Willamette restoration effort, and we are convinced these services could help advance many large ecosystem-restoration efforts where the lack of coordination, planning, and support services hinders the ability of community-based restoration groups to take their work to scale. ThThe funder and the nonprofit have retained staff with experience in natural resource policy, watershed science, and community restoration to work directly with grantees to develop restoration and monitoring strategies and provide technical and program management support. Every other year, the foundation and the agency host a large Willamette River conference to facilitate joint learning and information sharing and connect local implementers to broader restoration concerns. A grantee-only meeting is held in the interim years, and periodic tours and peer-to-peer exchanges

are organized to foster communication, learning, and exploration of mutually reinforcing strategies. The funding partners also commission independent research to expand knowledge and improve planning and evaluation tools available to the restoration community.

The nonprofit, geared more to providing technical assistance than funding, has developed its own unique approach to providing backbone services. It has worked closely with watershed council grantees to create a database to track project locations, workflow, contracts, landowner contacts, outreach activities, and monitoring data. Data are housed locally and on servers at the nonprofit, ensuring that core program information will be continuously accessible. With technical and financial support from the partners, watershed council grantees are testing the use of shared protocols for core monitoring of project results, and sharing contractors and expensive monitoring equipment. For the past two years, they have developed a combined order for plant material used in restoration projects, producing significant cost savings and providing greater market certainty for local nurseries.

Monitoring is occurring on more than 300 miles of stream. In just two years, local watershed groups involved in the program have planted more than 1 million native trees, shrubs, and grasses along targeted streams. Data from the public agency's grantmaking records verify that the partnership is catalyzing restoration work at a pace and scale far exceeding that which has occurred through the traditional approach to restoration grantmaking in the Willamette.

Progress

Two floodplain restoration projects were under way on the mainstem Willamette River when the partnership began in 2008. As of January 2013 – four and a half years after the funding partnership was launched – restoration projects are planned or in progress at 15 different sites on both public and private land. The projects involve 12 organizations, more than 20 landowners, and over 2,500 acres of land. To date, most projects have focused on invasive species removal, restoration of native forests on river floodplains, and the reconnection of former side channels to the main channel to provide winter refuge for juvenile salmon. A few are aimed at improving environmental conditions at inactive gravel pits. Others are exploring opportunities to modify or remove engineered rock embankments so the river can interact more naturally with its floodplain, allowing for better absorption of floodwaters and providing critical habitat for native fish.

In the smaller tributary watersheds, 800 landowners have agreed to participate in some kind of stream-restoration work on their properties. Projects have been implemented or are planned on more than 1,300 acres of land, much along contiguous streamside areas. Monitoring is occurring on more than 300 miles of stream. In just two years, local watershed groups involved in the program have planted more than 1 million native trees, shrubs, and grasses along targeted streams. Data from the public agency's grantmaking records verify that the partnership is catalyzing restoration work at a pace and scale far exceeding that which has occurred through the traditional approach to restoration grantmaking in the Willamette.

Members of the partnership also have worked, with some success, to align other Willamette funders around the same set of scientifically determined priorities. For example, the Bonneville

Power Administration (BPA), a regional power-marketing agency, is required to invest $800,000 annually over the next decade in habitat-restoration projects that will benefit threatened Chinook salmon and other species of concern. The state agency worked with BPA to focus those funds on the Willamette funding partnership's priorities and now administers the funds on behalf of BPA.

Reflections

It remains to be seen whether the progress achieved thus far will translate into detectable improvements in the health of the Willamette system. There is clearly much more restoration activity taking place than there was before the funding partnership existed, along with a greater sense of possibility and more productive collaboration among stakeholders. Being awarded the 2012 Thiess International Riverprize is a strong and well-informed endorsement of our efforts.

Here are some important lessons from the past four years:

- Partnerships are critical to success but quite challenging to sustain, especially over the course of a ten-year initiative. In the most effective partnerships, different players bring different assets to the table and work to apply them to shared priorities in complementary ways. For funders, effective partnerships are often hindered by differing priorities, the desire to maintain control of individual grant reviews, and the sometimes-lengthy process for making strategic decisions. Among grantees, a strong loyalty to place and organizational independence, and a history of competition for funds, make it difficult to establish and maintain support for a common agenda. Overcoming these obstacles takes real time and effort, and requires partners to learn about and respect each other's limitations.

- There are many important benefits to public-private funding partnerships – leverage, opportunities to achieve institutional alignment around important issues, and access to deep technical knowledge and critical partner networks. But public agencies must reckon with forces and circumstances unfamiliar to private foundations. ThThey face different constraints and answer to different constituencies than founda-
tions and non-profits. (In the Willamette, for example, the agency funder has had to address the perception among some long-time grantees that a focused funding partnership detracts from the opportunities of grantees outside the focus area.) As a result, public agencies work at a different – and typically slower – pace to get things done. In our partnership, the foundation and nonprofit invest significant time and energy participating in agency budget and planning processes that march to their own schedules and have unpredictable outcomes.

- ThThe larger and more ambitious the collaborative effort, the more important it is to manage expectations, both internal and external. It took some time to settle on specific funding strategies for the Willamette initiative, but once the strategies were in place, we hurried to disburse allotted funding. Grant budgets were quickly approved, application forms readied, and deadlines announced. In reality, while some prospective grantees were ready to respond quickly to the new program, others needed more time. Weeks and then months passed while we worked to answer questions and guide applicants through new, Willamette-specific application and review procedures. We have realized that the lag time between program announcement and grantee response was due to more than the proverbial learning curve. In our zeal to accomplish something significant, quickly, we may have overwhelmed key organizations in the delivery infrastructure. Ultimately, both the agency and the foundation underspent their initial allocations for the program. It is better, we now believe, to spread the overall funding commitment over a longer period, allowing some years to ramp both up and down, and to work with grantee partners to slowly and carefully integrate the new initiative into ongoing programs and priorities.

- Achieving better alignment among stakeholders is a long, slow process, but seems to be aided by frequent (and preferably face-to-

face) contact between and among the funding entities, grantees, and other partners. Fragmentation, duplication, and the "silo" effect are well-recognized obstacles to collaboration and collective impact. Acting with intention to improve organizational alignment is a first step toward overcoming these obstacles. The Willamette funding partnership uses a variety of tools and processes to improve coordination and communication, but in the first several years convening has been most important. We have convened conferences, grantee retreats, community meetings, and task forces to make and refresh connections and reinforce common objectives. Recently, grantees have begun to initiate coordination meetings, sometimes including the funding partners and sometimes not. We view this is as a positive indicator, and will watch with interest to see whether the practice continues over the life of (and beyond) the funding initiative.

Fragmentation, duplication, and the "silo" effect are well-recognized obstacles to collaboration and collective impact. Acting with intention to improve organizational alignment is a first step toward overcoming these obstacles.

Summary and Conclusion

The organizations participating in the Willamette funding partnership acknowledge that we are experimenting with a new approach and recognize that there are risks and uncertainties associated with many of the strategies being tested. However, we believe that without the application of new approaches (and the assumption of some risk on our part) it is more likely that status quo funding methods will generate limited ecological benefit in this large and complex river system.

Writing this article has helped clarify the keys to making progress for our partnership. Our grantmaking practices and principles – focused, attentive to social and institutional issues, proactive, flexible, and experimental – balance the importance of being responsive to implementers' needs with accountability to our trustees and the public. Geographic focus and attention (if not strict adherence) to the tenets of collective impact provide boundaries and operating coherence for what could be an impossibly sprawling and fragmented effort. The steadfast commitment of our organizations to an unusually long-term grant program has attracted loyalty to the cause, made room for both experimentation and relationship building, and allowed for a more strategic and robust approach to monitoring and evaluation.

The importance of making a long-term commitment when trying to address large-scale ecosystem restoration cannot be overstated. Moving the needle in these systems requires change, whether in agency behavior, funding practices, or farming methods; such changes require cultural shifts, and cultural shifts take time. Small improvements in land and water conditions aggregate and interact slowly and may not be detectable for many years. Connecting the dots between funder investments and positive outcomes is not always easy, and tracking progress in some important areas (alignment, for example) is tricky. Needless to say, making a long-term commitment to initiatives with such uncertain outcomes is not for every funder.

The Willamette funding partners know we cannot "fix" the river system in 10 years. We can, however, contribute to the development of a portfolio of restoration approaches and outcomes that serve as a guide to future efforts. We can create the models, capacity, alignment, and momentum that will enable groups to keep pushing the trajectory of change in the right direction, even if at a slower pace. We can test and adapt the principles of collective impact. Finally, we can share our experience, and hope that in so doing we contrib-

ute practicable knowledge and insight to other funders seeking to increase their effectiveness in tackling large, complex social and environmental problems.

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Pam Wiley, M.S., is director of the Willamette River Initiative at the Tides Center/Meyer Memorial Trust. Correspondence concerning this article should be addressed to Pam Wiley, Willamette River Initiative, 425 NW 10th Avenue, Suite 400, Portland, OR 97209 (email: pam@mmt.org).

Todd Reeve, M.S., is Chief Executive Officer at the Bonneville Environmental Foundation.

Ken Bierly, M.S., is coordinator of the Willamette Special Investment Partnership with the Oregon Watershed Enhancement Board.

Kendra Smith, M.S., is manager of the Willamette Model Watershed Program at the Bonneville Environmental Foundation.

CITY OF LAKESIDE

On Beautiful Ten Mile Lakes

December 22, 2021

OWEB Board Members
775 Summer St. NE Suite 360
Salem, OR 97301-1290

RE: Tenmile Lakes Native Fisheries and Water Quality Restoration FIP Application

Dear Board Members,

I am writing to you in support of the Tenmile Lakes Basin Partnership Focused Investment Partnership grant application submitted for funding in January 2022.

As a member of the Tenmile Lakes Steering Committee, we support the Partnership's long-term efforts to improve Tenmiles native fisheries and water quality.

Through the period of 2023 to 2027, we support the priority restoration actions and can provide the in-kind donations as listed within the grant application.

We urge you to support the Tenmile Lakes' Basin Partnership's Native Fisheries Initiative, which will improve native coho populations and address the water quality degradation the Lakes are experiencing.

We look forward to working with OWEB and the Tenmile Lakes Basin Partnership on actionable projects to improve our watershed.

Respectfully,

James Edwards
Mayor, City of Lakeside

Coalition of Oregon Land Trust Testimony
Oregon Watershed Enhancement Board Meeting
July 26th, 2022
Wallowa County, Oregon

Hello everyone. Thank you so much for the opportunity to testify today at this board meeting. My name is Karsyn Kendrick, and I am the Coalition of Oregon Land Trust's new Conservation Program Manager. In this role, I support COLT's policy and government relations initiatives, coordinate our pro bono program, and help to facilitate member education and capacity.

I am here today with the Oregon Conservation Partnership, and on behalf of COLT's 32 member organizations across the state of Oregon to voice our support for OWEB's recommended budget and to share some of the successes from the last year that were made possible by OWEB's grant funding and the amazing work of our members.

I want to start by thanking the Board and Director Charpilloz-Hanson for providing a thoughtful public input and feedback process on the Agency Recommended Budget.

We would like to voice our strong support for the $10 million general fund request for the Oregon Ag Heritage Program. This program fills a critical need in the state to protect our well-managed farms and ranches by providing a non-federal match for the Agricultural Conservation Easement Program.

This year, with OAHP coming on line, Oregon has been allocated $6.7 million of federal funding for the ACEP ALE program, a record level for this Farm Bill program, which historically received an average of $500,000/year. This program is a game-changer for conservation on agricultural lands - finally bringing Oregon in line with the 26 other states with matching working lands easement grant programs to protect farm and ranch land from development.

COLT is also in strong support for the state to fund OWEB staff capacity to help support and manage the new programs the agency is running to get funding on the ground for fire, drought, and watershed protection.

I am also happy to share our 2022 State of the Lands Report with the Board. I have brought some here for you to review, but I would like to quickly highlight some of the success stories from the past year. This year's report summarizes the work of our land trusts and partners throughout the state that together have protected over 350,000 acres of land.

We are proud to share the story of Trout Creek Ranch, a 16,645-acre ranch in southeast Oregon with 500,000 acres of public lands grazing leases. This ranch supports 10% of Oregon's sage-grouse population on wild and working lands with water resources that are critically important in the face of climate change. Trout Creek lies between the Pueblo and Trout Creek mountains, and offers unparalleled potential to build a connected, climate-resilient landscape linking more than 1 million acres of wildlife habitat.

A large focus of this report and our work are projects that are centered on Indigenous knowledge and expertise, from a cultural burn training outside of Eugene with Tribes in the Willamette Valley to a First Foods gathering in the Wallowa Valley that engaged more than 75 tribal members in gathering foods and medicines over the course of 3 days.

With help from partners like OWEB, our community is driving projects that build climate resilience, provide habitat protection, connect people and place, and serve communities across the state. At the same time, COLT's members are greatly impacted by the decisions around how OWEB grants are awarded, and are eager to collaborate with OWEB to make these programs as effective as possible for on the ground conservation.

We hope you take a few moments to read this report, and we are grateful to OWEB for supporting the creation of these stories. Thank you again for the opportunity to speak today.

July 26-27, 2022 OWEB Board Meeting
Water and Climate Committee Update

Committee Members

Bruce Buckmaster and Jamie McLeod-Skinner (Co-Chairs), Dan Brown, Stephen Brandt, Kelly Coates, Gary Marshall, Lindsay McClary, Brenda McComb, Eric Murray, Cory Owens, Meg Reeves, Dan Shively

Meeting Summary

The Water and Climate Committee met on June 29, 2022. Cathy MacDonald, Chair of the Oregon Global Warming Commission (OGWC), provided an update to the committee. She reviewed the Commission's sequestration goal for natural and working lands in Oregon and explained that legislation to facilitate implementation and tracking of the goal did not pass in 2022. However, the OGWC secured funding from the US Climate Alliance and the USDA to support several aspects of implementation and tracking.

Staff provided an update about outreach and engagement around the OWEB climate resolution. Staff held six remote public listening sessions in April and May and a listening session specifically for Tribes. OWEB also gathered feedback through an online survey, one-on-one interviews, and ECONW is also asking for feedback during the interviews they are doing as a part of their diversity, equity, and inclusion contract with OWEB. Staff have prepared a report summarizing the feedback received that will be provided to the board prior to the July meeting (see Agenda Item G).

The committee discussed the idea of developing a memo from the board to all who participated in the climate resolution engagement effort, summarizing feedback received. Staff will develop a memo for review at the July board meeting.

Staff updated the committee on implementation of drought programs received in the December 2021 special legislative session. Grant offerings have been launched for two of the programs (Jefferson County soil stewardship and Klamath County livestock watering); the drought resilience offerings will launch in September; and the irrigation modernization offering will be aligned with the timing of public comment processes required by other funding sources for the projects.

The committee discussed several cross-cutting topics with the DEI and Grants committees, including community vulnerability and the importance of connection and engagement with people who are not landowners but who are affected by OWEB-funded projects.

One public comment was received following the March committee meeting that was forwarded to the committee after the meeting. The committee expressed support for several water-focused topics being presented at the October 2022 board meeting.

To Be Presented at the July 2022 Board Meeting by:

Bruce Buckmaster and Jamie McLeod-Skinner

Staff Contact

Stephanie Page, Deputy Director
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July 26-27, 2022 OWEB Board Meeting
Grants Committee Update

Committee Members
Barbara Boyer and Dan Brown (co-chairs), Lindsay McClary, Mark Labhart

Meeting Summaries

At the June 2 meeting, the committee heard an update on the intensively monitored watershed (IMW) project to measure population response of Spring Chinook and Winter Steelhead in the John Day watershed. Every year, NOAA makes $300,000 available to OR, WA, and ID. The current spending plan includes up to $600,000 of IMW funds for the biennium. The project started in 2008; a 15-year report will be published next year.

The committee received an update on the status of the Oregon Agricultural Heritage Program, with staff noting that a planned fall solicitation will likely result in board action on conservation easement and conservation management plan grants at either the April 2023 or July 2023 meetings.

The remainder of the June 2 meeting focused on preparation for the June 14-15 Grants Committee meeting.

The June 14-15 meeting included interviews with each of the 11 FIP applicant partnerships. Applicants provided an overview of their proposed FIP and committee members asked questions, many of which were provided to the partnerships in advance. The committee concluded the first day of the meeting with a straw poll ranking the applications. On the second day, the committee deliberated on the rankings and settled on a final ranking that is included in the staff report for Item E of the July board meeting.

To Be Presented at the July 2022 Board Meeting by:

Dan Brown and Barbara Boyer

Staff Contact

Eric Williams, Grant Program Manager
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July 26-27, 2022 OWEB Board Meeting

Diversity, Equity, and Inclusion (DEI) and Environmental Justice Committee Update

Committee Members

Kelly Coates and Dan Shively (co-chairs), Bruce Buckmaster, Liza Jane McAlister

The DEI and Environmental Justice Committee met on June 8, 2022. Kelly Coates and Dan Shively co-chaired the meeting.

Meeting Summary

OWEB staff updated the committee on its efforts to reach out to non-traditional partners. Staff have committed to engaging with three new non-traditional partners each quarter. In addition, OWEB Executive Director Lisa Charpilloz Hanson is working to hold government to government outreach meetings with all Oregon's federally recognized tribes plus the Nez Perce Tribe before the end of her first year.

During the last quarter OWEB staff have met with the following organizations:

- Organic coalition
- Capitol Connections
- Albina Vision Trust
- Roundhouse Foundation

Committee members expressed interest in being invited to these meetings when appropriate or when committee members can help make connections. The committee is also interested in learning more about who are OWEB's grantees. OWEB staff will work to compile this information and review with the committee at the September 2022 meeting.

Staff provided an update about outreach and engagement around the board's climate resolution. A full report will be provided to the board at the July 2022 board meeting (Agenda Item G).

Shivangi Jain, ECONW, provided an overview of where ECONW is in its DEI work plan with OWEB staff and board. Shivangi provided an overview of the July 2022 DEI exercise with the board and discussed next steps and timelines for work products. The committee expressed interest in meeting more frequently from September 2022 through January 2023, if needed, to provide feedback on products developed by ECONW before they are provided to the full board.

The committee also expressed interested in engaging with the staff DEI team in the future. OWEB staff that are members of the DEI team will be invited to future board committee meetings.

To Be Presented at the July 2022 Board Meeting by:

Kelly Coates and Dan Shively

Staff Contact

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courtney.shaff@oweb.oregon.gov or 971-345-7012

Kate Brown, Governor

OREGON WATERSHED ENHANCEMENT BOARD

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Agenda Item E supports OWEB's Strategic Plan priority # 3: Community capacity and strategic partnerships achieve healthy watersheds.

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Eric Williams, Grant Program Manager

SUBJECT: Agenda Item E – 2021-2023 FIP Awards
July 26-27, 2022, Board Meeting

I. Introduction

Staff recommend the board award five Focused Investment Partnership (FIP) applications for the 2021-2023 biennium as ranked by the board's Grants Committee. A summary of the process leading to this recommendation is provided below.

II. Background

In June 2013, the 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

A FIP is an OWEB investment that addresses a board-identified focused investment priority of significance to the state; achieves clear and measurable ecological outcomes; uses integrated, results-oriented approaches as identified through a strategic action plan; and is implemented by a high-performing partnership.

FIP funding supports partnerships in pursuing conservation initiatives with up to $12 million over six years. In the past, the board has supported focused investments accounting for 25% of the biennial board spending plan (see Agenda Item J at the October 2018 board meeting).

III. Solicitation and Review Process

In August 2021, staff announced the solicitation for FIP initiatives. Partnerships were required to formally consult with staff prior to applying by January 13, 2022. The eleven applications submitted by the January deadline covered all board-identified priorities in the FIP program.

Applications were reviewed from March-April 2022 in two phases by expert review teams. Attachment A provides the criteria on which the initiatives were evaluated. The first review phase consisted of a partnership capacity evaluation in which the initiatives were reviewed by experts in organizational capacity. The second review phase involved an ecological review team with scientific experts representing each board-designated priority. Evaluations were provided to applicants and posted on OWEB's website on May 31, 2022, and are found in Attachment B.

The Grants Committee met at a virtual public session on June 14-15, 2022, to interview representatives from each of the 11 FIP initiative applicants and to rank applications for the full board. After the interviews, the committee conducted a preliminary ranking. Clear breaks were evident in this ranking, and subsequent deliberations focused on the applications that were clustered in the middle of the rankings. The final committee ranking is found in Attachment C.

IV. FIP Funding Availability

At the July 2021 meeting, the board established the 2021-2023 Spending Plan with a line item of $10 million for new FIP initiatives for the biennium. At the July 2022 meeting, the board will consider adding new/additional funding to the spending plan (see Agenda Item F), which includes federal Pacific Coastal Salmon Recovery Funds (PCSRF), and Infrastructure Investment and Jobs Act Funds (IIJA), both administered through the National Oceanic and Atmospheric Administration. For the new FIP initiatives, staff recommend adding $3 million to the spending plan, bringing the total amount of funding for new FIP initiatives to $13 million.

The top five applications ranked by the Grants Committee are put forward by the Klamath Siskiyou Oak Network, East Cascades Oak Partnership, Siuslaw Coho Partnership, Oregon Central coast Estuary Collaborative, and Coos Basin Coho Partnership. The top five applications request just over $12.9 million for the 2021-2023 biennium, and three of the top five applications are eligible to receive PCSRF and IIJA funding. Attachment D displays how the top five ranked applications, along with current and future FIP initiatives, would fit into 25% of the board spending plan over the next several biennia.

V. Recommendations

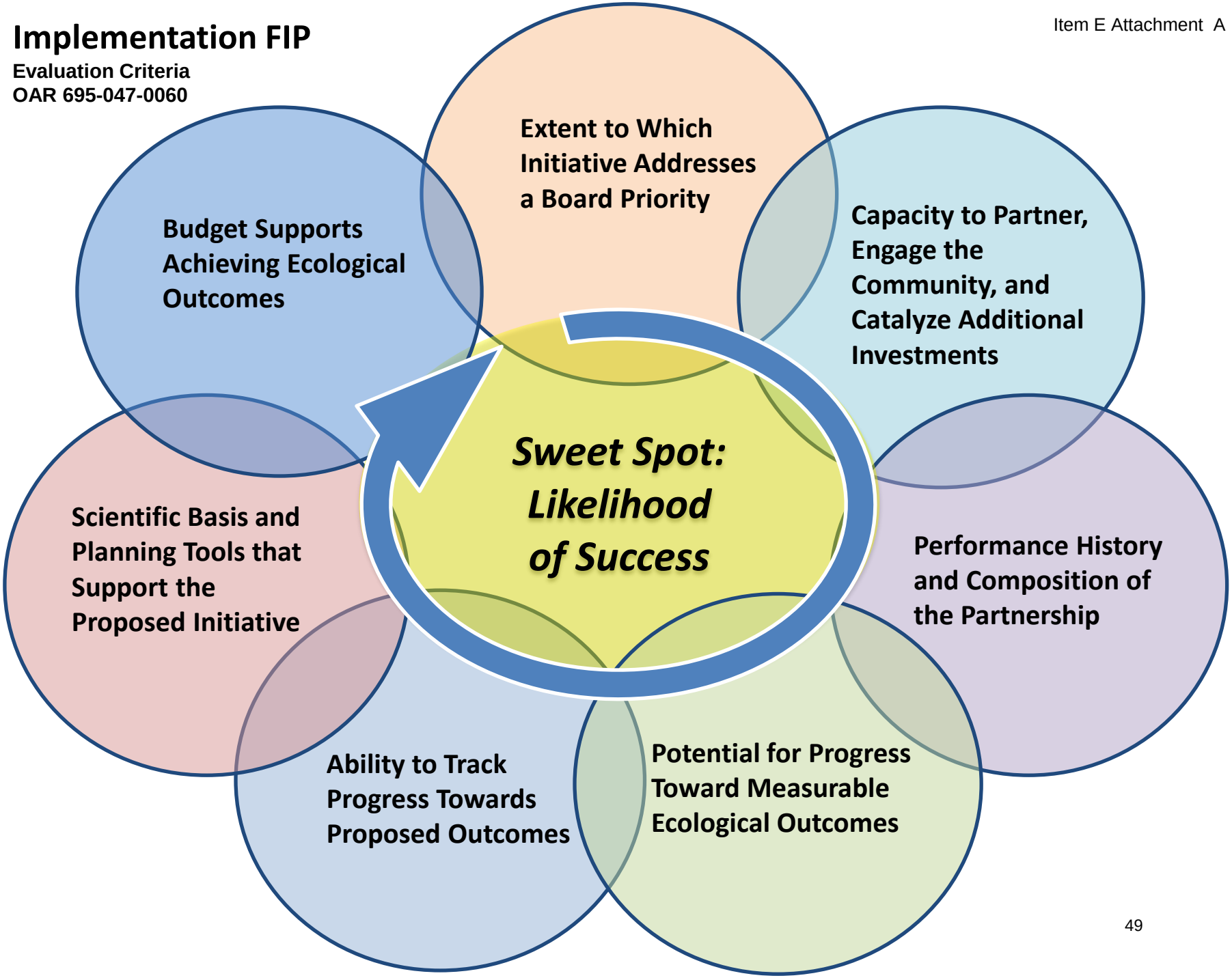
Staff recommends the board increase the new FIP solicitation line item in the spending plan by $3 million, award $12.9 million to the top five gray shaded applications listed in Attachment C, and delegate authority to the executive director to award project-level grants to these partnerships for the 2021-2023 biennium with an award date of July 26, 2022.

Attachments

A. FIP Evaluation Criteria
B. Evaluations: 2021-2023 FIP Applications
C. Grants Committee Rankings
D. Future FIP Funding Graph

Implementation FIP

Evaluation Criteria
OAR 695-047-0060



1. **Name of Initiative:** Little Butte Oak Initiative

2. **Name of Partnership:** Klamath Siskiyou Oak Network

3. **Application Number:** 223-8217-20121

4. **Initiative addresses the following Board-identified Priority(ies):** Oak Woodland and Prairie Habitat

5. **Initiative Abstract (from the application)**
   Oak-prairie ecosystems have experienced dramatic loss and degradation. Restoration action is essential, climate-smart, and will benefit wildlife and people. Guided by the Klamath Siskiyou Oak Network Strategic Conservation Action Plan, the Little Butte Oak Initiative will reduce the two highest ranked threats - fire exclusion and conifer encroachment - through restoration actions and strengthen partnerships to support future work.

   This project will:
   - Catalyze tribal, federal, and private landowner collaboration, support, and capacity for oak restoration through implementation of a communication strategy, and community and tribal engagement.
   - Restore 2,480 acres of oak habitat within the Initiative geography using prescribed fire, reduced encroachment, noxious weed abatement, and native understory.

   Toward the following ecological outcomes:
   - Stable populations of oak-prairie-dependent wildlife species sustained by habitat structure and native plant species composition.
   - Oak-prairie ecosystems resilient to habitat loss and degradation from climate, extreme fire, insects, and disease.

Core partners include Klamath Bird Observatory, Lomakatsi Restoration Project, Oregon Department of Fish and Wildlife, Pacific Birds Habitat Joint Venture, Southern Oregon Forest Restoration Collaborative, The Nature Conservancy, Understory Initiative, Bureau of Land Management Medford District, US Fish and Wildlife Service, Natural Resources Conservation Service, and US Forest Service Rogue River-Siskiyou National Forest.

6. **Budget Overview:**

Funding Period	OWEB Funding Request	Estimated Match
Biennium 1	$1,373,266	$959,420
Biennium 2	$2,714,735	$1,044,376
Biennium 3	$2,959,837	$819,272
Total	$7,047,838	$2,823,068

7. **Overall Initiative Rating:**
   (see attached evaluation criteria review worksheet for details)

Evaluation Criteria	Rating
A) Extent to which initiative addresses a board priority	N/A
B) Capacity to partner, engage the community, and catalyze additional investments	High
C) Performance history and composition of the partnership	High
D) Potential for progress toward measurable ecological outcomes	Medium
E) Ability to track progress towards proposed outcomes	High (-)
F) Scientific basis and planning tools that support the proposed initiative	High (-)
G) Budget supports achieving ecological outcomes	Medium

8. **Board Committee Ranking:** 1

Attachment A: Initiative Map
Attachment B: Evaluation Criteria Ratings Worksheet

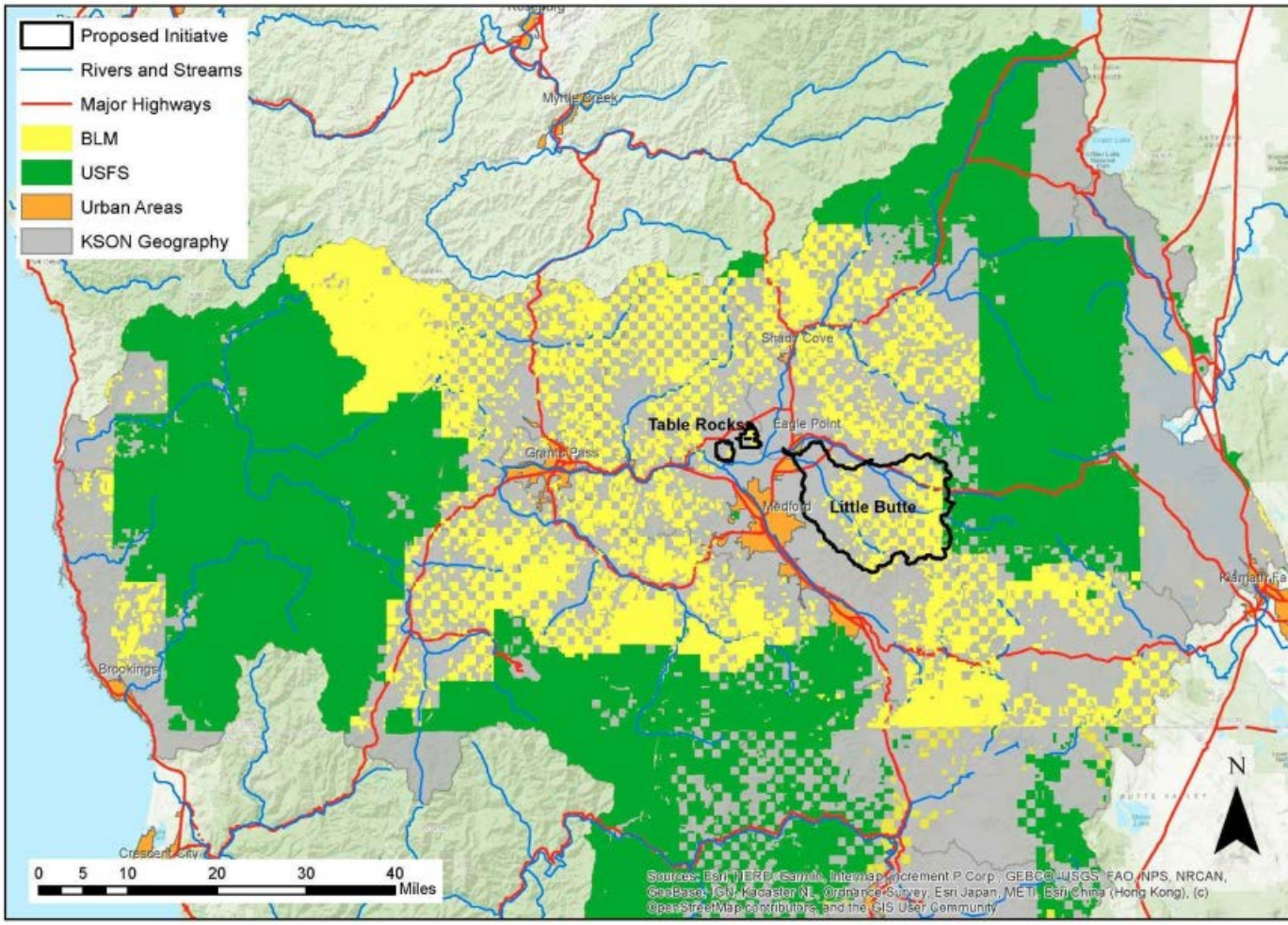


Figure 3. KSON Proposed Initiative geography overview. The Little Butte Oak Initiative (i.e., focal geography) includes the Little Butte Creek Watershed and Table Rocks Conservation Area.

FIP Priority Review: Oak Woodland and Prairie Habitat

Name of Initiative: Little Butte Oak Initiative

Name of Partnership: Klamath Siskiyou Oak Network

EVALUATION CRITERIA

(a) The extent to which the initiative addresses a Board-identified priority.
Rating: This criterion will be evaluated through the OWEB Board Grants Committee

(b) The capacity to partner, engage the community, and catalyze additional investments applied to activities within the initiative geography.
Rating: High

STRENGTHS:

- The core partners in this proposal have a track record of leveraging investments in previous restoration work to implement conservation work at a landscape scale.
- The partners have experience working on previously funded FIP initiatives and have identified clear roles and responsibilities for the partners.
- The partnership has developed a clear plan for communicating and engaging with a broad range of stakeholders throughout the life of the initiative.

CONCERNS:

- The proposal demonstrates limited ability to catalyze additional investments. All match funds included in the FIP proposal come from two sources: Klamath Bird Observatory and Lomakatsi Restoration Project. There is limited information provided about the match.
- Lomakatsi Restoration Project, a core partner and key implementor for this FIP proposal, is involved in other FIPs and many projects throughout the state, which may impact their ability to engage in this proposal and meet the proposed ecological outcomes.

ADDITIONAL COMMENTS:

None

(c) The performance history and composition of the partnership.
Rating: High

STRENGTHS:

- The partners work with all the entities in the FIP geography who do similar work. The partnership has a process for bringing on new partners when necessary.
- The partners recently updated their Memorandum of Understanding to include detailed information on their decision-making and internal communication processes.

CONCERNS:

- The proposed work plan is very reliant on Lomakatsi Restoration Project for implementation and a key individual at Klamath Bird Observatory for partnership facilitation and management. Long-term success of the partnership could be impacted if either organization experiences staff turnover.
- Though the proposal includes a clear community outreach strategy, it is unclear how much outreach to engage private landowners and build community support for the proposed ecological outcomes has already started.

ADDITIONAL COMMENTS:

None

(d) The extent to which the proposed approach will make progress toward measurable ecological outcomes.

Rating: Medium

STRENGTHS:

- The partners have a lot of experience implementing prescribed fire treatments and engaging the community around this work.
- The partnership has an excellent understanding of historic habitat conditions and the natural processes that once maintained them, both in scientific and cultural terms. The proposal also describes how poor forest management and fire suppression has led to current landscape problems.

CONCERNS:

- Some of the work proposed for the Table Rocks site may be maintaining a land acquisition site obtained in part with previous OWEB funding, which might not be consistent with the intent of the FIP program.
- The proposal did not discuss, in detail, the barriers to implementation of prescribed fire and associated strategies to overcome challenges.
- How individual restoration projects will be maintained over the long term is not well described in the proposal. If projects are not well managed, the long-term ecological uplift is jeopardized.
- Much of the restoration work is slated to occur on private lands and it is unclear how quickly landowners can be engaged to get projects on the ground.

ADDITIONAL COMMENTS:

None

(e) The ability to track progress towards proposed outcomes.

Rating: High (-)

STRENGTHS:

- The partnership will incorporate baseline data into their monitoring plan and have a method to use data to inform adaptive management.

- The Theory of Change included in the proposal is easy to follow and understand.
- There is a detailed monitoring plan under development which will be ready before the implementation of the FIP initiative, if funded.
- There are existing databases in place for the partnership to store and manage data collected.
- The proposal clearly depicts which partners are responsible for each of the monitoring tasks.

CONCERNS:

- The table in the proposal that describes oak habitat conservation priority watersheds does not clearly describe how thresholds were developed or how these thresholds inform project prioritization.
- It is unclear how much, and what kind of, pre-project data will be needed to measure the impact of restoration efforts. It may be difficult to discern a trend with bird related metrics over the life of the initiative.

ADDITIONAL COMMENTS:

- The partnership is encouraged to monitor how plant communities respond to prescribed fire treatments.

(f) The scientific basis and planning tools that support the proposed Initiative.
Rating: High (-)

STRENGTHS:

- The proposal describes a logical pathway for how the partnership has selected the proposed geography, and the entailed restoration actions.
- The partnership has clearly incorporated various climate projections into the proposed initiative.
- The proposal provides a good discussion of how the partnership is incorporating Traditional Ecological Knowledge into the proposed initiative.

CONCERNS:

- The proposal would benefit from a larger discussion on oak woodland and oak savanna, and how the partnership determines what is the appropriate ecosystem target at individual sites.

ADDITIONAL COMMENTS:

None

(g) The extent to which the allocation of funds across proposed grant types will support the achievement of the proposed ecological outcomes.
Rating: Medium

STRENGTHS:

- The partnership's intended investment in public engagement is encouraging and will be necessary to ensure community support.
- The amount of the budget allocated for restoration projects grows over the life cycle of the initiative, which is consistent with the description of where the partnership is at with their restoration planning.

CONCERNS:

- With only two partners set to receive funding through the initiative, the ability of the partnership to achieve its goals may be limited if one or both partners experience organizational challenges or capacity constraints.
- The region has a number of contractors that would likely be interested to conduct the restoration work described in the proposal; however, it is not clear if outside contractors would be invited to bid for a contract, or if all of the work would be completed "in-house" with the partners.
- Engagement with tribes is included in the proposal, but it is unclear if it will occur prior to restoration efforts begin.

ADDITIONAL COMMENTS:

None

1. **Name of Initiative:** Improving Aquatic Health in the Harney Basin

2. **Name of Partnership:** Harney Basin Wetlands Collaborative

3. **Application Number:** 223-8219-20123

4. **Initiative addresses the following Board-identified Priority(ies):** Oregon Closed Lakes Basin Wetland Habitats

5. **Initiative Abstract (from the application)**
   For many decades the core partners Malheur National Wildlife Refuge (MNWR), Ducks Unlimited (DU), Natural Resources Conservation Service (NRCS), U S Geological Survey (USGS), Audubon Society of Portland (PA), Wet Meadow Partners Consulting Group (WMP), Harney Soil and Water Conservation District (HSWCD), County Court, Friends of MNWR (FOMR), Intermountain West Joint Venture (IWJV), Harney County Watershed Council (HCWC), Eastern Oregon Agricultural Research Center (EOARC), and landowners worked to accomplish their separate goals around improving flood irrigated wet meadows and improving the waterbird habitat value of Malheur Lake. But only through the collaborative efforts of the Harney Basin Wetlands Collaborative (HBWC) have those efforts come together. Convened by High Desert Partnership (HDP) HBWC addresses the goals of the Oregon Closed Lakes Basin Wetland Habitats priority of OWEB. Including wetland degradation and loss, promoting flood irrigation, reducing carp, and managing invasive plants in wet meadows. HBWC partners are dedicated to restoring this critical habitat and will be able to build on the significant progress of addressing wetland sustainability in Harney Basin.

6. **Budget Overview:**

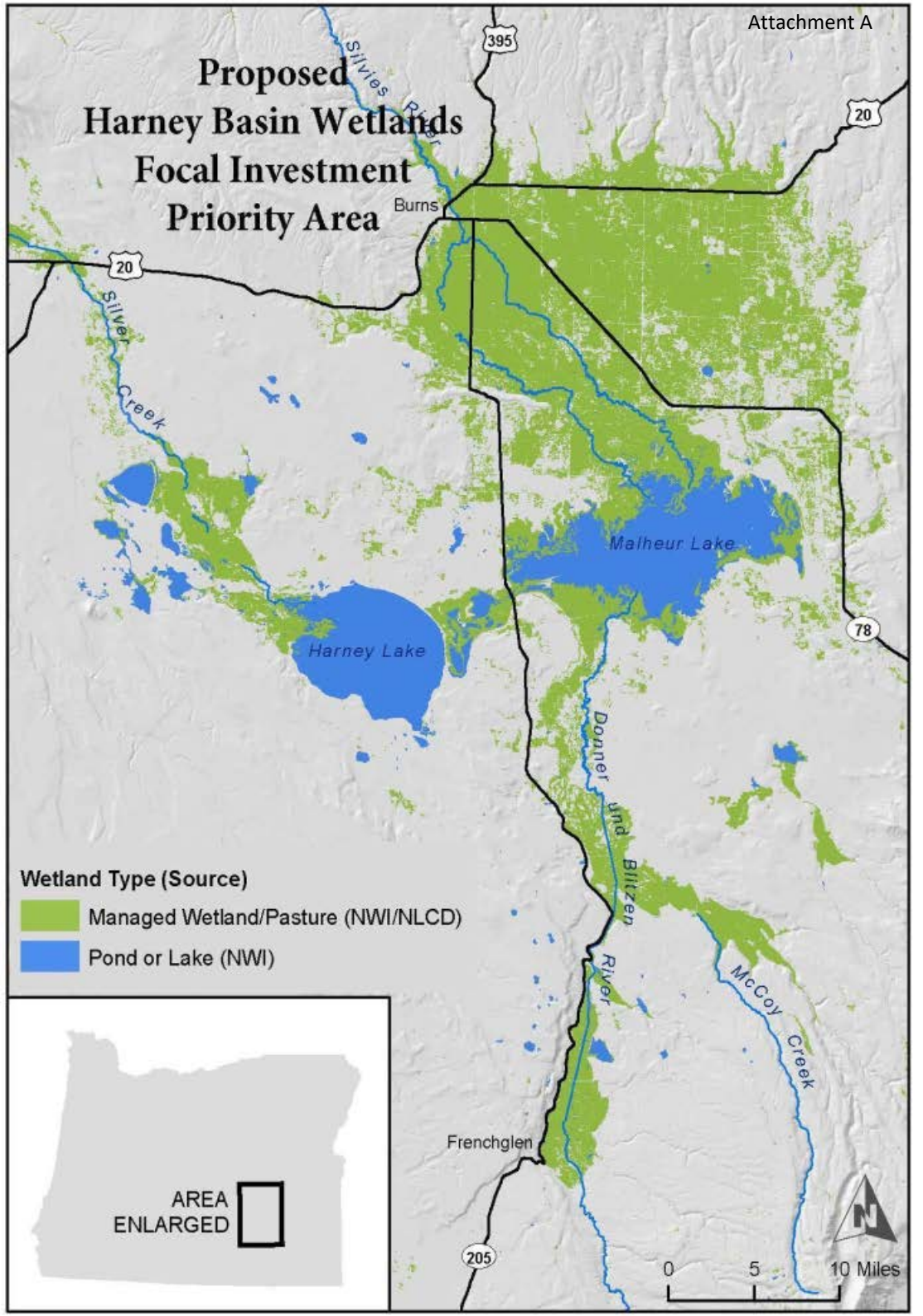
Funding Period	OWEB Funding Request	Estimated Match
Biennium 1	$3,923,080	$1,366,706
Biennium 2	$3,856,280	$1,366,706
Biennium 3	$3,972,180	$1,366,706
Total	$11,751,540	$4,100,118

7. **Overall Initiative Rating:**
   (see attached evaluation criteria review worksheet for details)

Evaluation Criteria	Rating
A) Extent to which initiative addresses a board priority	N/A
B) Capacity to partner, engage the community, and catalyze additional investments	High
C) Performance history and composition of the partnership	High
D) Potential for progress toward measurable ecological outcomes	Medium
E) Ability to track progress towards proposed outcomes	Medium
F) Scientific basis and planning tools that support the proposed initiative	Medium (+)
G) Budget supports achieving ecological outcomes	Medium (+)

8. **Board Committee Ranking:** 6

Attachment A: Initiative Map
Attachment B: Evaluation Criteria Ratings Worksheet



Extent of wetlands in the Harney Basin, Oregon. Produced in the U.S. Fish and Wildlife Division of Realty and Refuge Information, Portland, OR. 9/17/2014. File 14-131-2.MXD.

FIP Priority Review: Oregon Closed Lakes Basin Wetland Habitats

Name of Initiative: Improving Aquatic Health in the Harney Basin

Name of Partnership: Harney Basin Wetlands Collaborative

EVALUATION CRITERIA

(a) The extent to which the initiative addresses a Board-identified priority.
Rating: This criterion will be evaluated through the OWEB Board Grants Committee

(b) The capacity to partner, engage the community, and catalyze additional investments applied to activities within the initiative geography.
Rating: High

STRENGTHS:

- The High Desert Partnership is the convener and has built a strong organization with a successful history of engaging the community and leading collaborative efforts.
- The partnership contracts for facilitation services through Oregon Consensus, which provides additional capacity to the partnership.
- The partnership uses a collaborative consensus approach to make decisions. This includes the allocation of funding to projects, which allows all partnership members to be engaged in decisions.
- The partnership proposes to invest significant resources in stakeholder engagement. Resources include the development of communication tools, which have been identified as necessary to support the needs of the agricultural community.

CONCERNS:

- A significant portion of the proposed FIP funding runs through the High Desert Partnership. Turnover or other challenges within the organization could impact the partnership's ability to achieve the proposed ecological outcomes.
- A significant amount of match funding for the FIP initiative comes from one core partner—the original source of this funding is unclear.

ADDITIONAL COMMENTS:

- The partnership has made great strides to engage the community in many conservation activities. The long-term effectiveness of these engagement efforts will be put to the test by the basin's profound natural resource issues.

(c) The performance history and composition of the partnership.
Rating: High

STRENGTHS:

- The composition of the partnership is inclusive. Urban and rural stakeholders and the Burns Paiute Tribe make the right collection of partners to achieve the proposed ecological outcomes.
- The partnership has a proven track record to successfully implement the actions described in the proposal and has demonstrated its ability to adaptively manage collective restoration objectives.
- The partnership has been a model for addressing complex natural resource concerns in an effective manner that has resulted in many benefits to the larger community, beyond the scope of the proposed initiative.

CONCERNS:

None

ADDITIONAL COMMENTS:

None

(d) The extent to which the proposed approach will make progress toward measurable ecological outcomes.

Rating: Medium

STRENGTHS:

- The proposal clearly describes a model of Malheur Lake that the partners use to guide their restoration efforts.
- The proposal provides good details around the partnership's goals for wet prairie conservation, and how the partners met similar goals in their previously awarded FIP initiative.

CONCERNS:

- The proposal lacks a discussion of how management planning and implementation management will be done with in-field infrastructure—installed in collaboration with private landowners to maintain wet meadow habitats.
- The partnership has made progress to identify potential causes surrounding poor habitat conditions in Malheur Lake and various alternatives to begin addressing the issues. However, only modest lake restoration efforts occurred in the previous FIP initiative. It is unclear how far the partners will get in a second round of FIP funding given the complexities and associated costs of the issues impacting the lake.
- It is unclear how effective the proposed vegetation management will be to address non-native species that are becoming widespread.

ADDITIONAL COMMENTS:

None

(e) The ability to track progress towards proposed outcomes.
Rating: Medium

STRENGTHS:

- The partnership has a variety of existing data and has incorporated some of it into predictive models to better understand the factors that affect lake and wetland conditions.
- Hypothesis testing is well incorporated into the partnership's monitoring protocol.
- The strategic action plan provides an extensive description of the partnership's monitoring approach and theory of change for their proposed initiative.

CONCERNS:

- It is unclear how indicators or metrics associated with ecological outcomes would be monitored over time.
- The proposal only generally describes how data will be analyzed and interpreted. The data analysis for each data type is not described and does not match the variety of data that the partners plan to collect.
- While the strategic action plan describes a strong monitoring approach, this does not always carry over to the answers to relevant monitoring questions in the proposal.

ADDITIONAL COMMENTS:

None

(f) The scientific basis and planning tools that support the proposed Initiative.
Rating: Medium (+)

STRENGTHS:

- The application clearly describes the science that partners have done to date, and how it resulted in the analysis of limiting factors beyond carp when considering restoring the Malheur Lake ecosystem.
- The partnership clearly articulates how they will incorporate learning from implementing the first FIP initiative.
- The proposal provides a solid strategy development discussion centered around effects of climate change and specifically how it will impact irrigation in the basin.

CONCERNS:

- The proposed strategy appears to focus on reestablishing a single type of wetland and it is unclear if this provides the complexity required to sustain wetland habitats over time.
- The changing hydrology associated with climate change makes it difficult to build a strategy around historic conditions.
- Litigation involving water rights in certain systems may delay, or prevent, the implementation of flood-irrigated wet meadow projects.

ADDITIONAL COMMENTS:

None

(g) The extent to which the allocation of funds across proposed grant types will support the achievement of the proposed ecological outcomes.

Rating: Medium (+)

STRENGTHS:

- The proposal includes grant types that are consistent with the partnership's proposed work plan.
- The partnership has a clear understanding of the capacity needed to run the partnership and successfully engage the community. This is reflected well in the proposed grant types.

CONCERNS:

- The partnership requests a modest monitoring budget, particularly in biennium one and two of the initiative. This may hinder the ability to effectively track outcomes and inform adaptive management.
- The proposal includes a relatively large amount of technical assistance in biennium one and two. This is surprising given the initiative is largely a continuation of the first FIP initiative that also featured a large amount of technical assistance projects.

ADDITIONAL COMMENTS:

None

1. **Name of Initiative:** Oak and Fire: Restoring Resilience in the East Cascades

2. **Name of Partnership:** East Cascades Oak Partnership

3. **Application Number:** 223-8221-20125

4. **Initiative addresses the following Board-identified Priority(ies):** Oak Woodland and Prairie Habitat

5. **Initiative Abstract (from the application)**

The East Cascades Oak Partnership works on the east slopes of the Cascades where biodiversity and climate resilience are threatened by fire suppression, grazing, and development. Over 25 tribal, public, and private entities are partnering to implement ECOP's Strategic Plan, restoring fire-adapted conditions, protecting biodiversity, and maintaining climate resilience in this Oregon white oak landscape, an OWEB FIP priority.

We will: protect 15,000 acres of priority habitat from conversion; reverse the effects of fire suppression on 17,000 acres through restoration; refine spatial priorities at the site scale; strategically deploy outreach tools to engage landowners; connect people with management guidance and technical support; lower barriers to the use of prescribed fire; expand access to a variety of native plant materials; implement monitoring work that measures project effectiveness and long term ecological outcomes; adapt our monitoring tools to better reflect tribal values for use on reservation; and continue to facilitate partnership meetings and business through 2027.

Our partnership works in two states. Oregon partners include:
ODF, ODFW, USFS – Mt. Hood National Forest, USFS – Columbia River Gorge National Scenic Area, NRCS, Confederated Tribes of the Warm Springs, Oregon Parks and Recreation, Friends of the Columbia Gorge Land Trust, Pacific Birds, Columbia Land Trust

6. **Budget Overview:**

Funding Period	OWEB Funding Request	Estimated Match
Biennium 1	$2,544,000	$4,250,000
Biennium 2	$2,433,000	$9,084,000
Biennium 3	$2,177,000	$548,000
Total	$7,154,000	$13,844,000

7. **Overall Initiative Rating:**
(see attached evaluation criteria review worksheet for details)

Evaluation Criteria	Rating
A) Extent to which initiative addresses a board priority	N/A
B) Capacity to partner, engage the community, and catalyze additional investments	High
C) Performance history and composition of the partnership	High (-)
D) Potential for progress toward measurable ecological outcomes	High (-)
E) Ability to track progress towards proposed outcomes	Medium

F) Scientific basis and planning tools that support the proposed initiative	High (-)
G) Budget supports achieving ecological outcomes	High (-)

8. Board Committee Ranking: 2

Attachment A: Initiative Map
Attachment B: Evaluation Criteria Ratings Worksheet

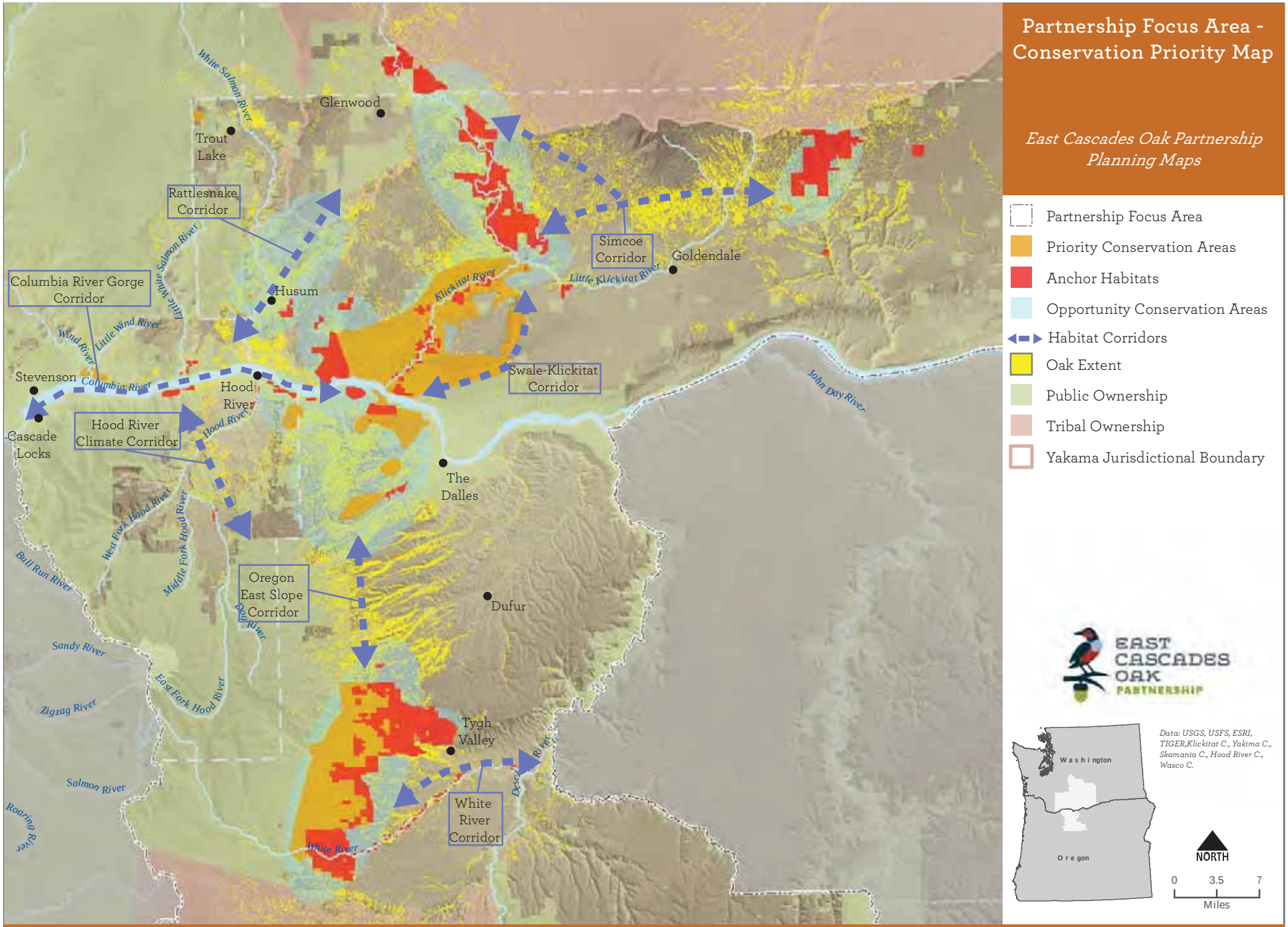


Figure 9: ECOP's Conservation Priorities

FIP Priority Review: Oak Woodland and Prairie Habitat

Name of Initiative: Oak and Fire: Restoring Resilience in the East Cascades

Name of Partnership: East Cascades Oak Partnership

EVALUATION CRITERIA

(a) The extent to which the initiative addresses a Board-identified priority.
Rating: This criterion will be evaluated through the OWEB Board Grants Committee

(b) The capacity to partner, engage the community, and catalyze additional investments applied to activities within the initiative geography.
Rating: High

STRENGTHS:

- The partnership has a clearly defined leader and has allocated a significant amount of funding to partnership technical assistance throughout the life of the FIP.
- The partnership has a detailed strategic action plan (SAP) and well-developed governance documents, including a clearly described decision-making process.
- The partnership completed extensive stakeholder engagement during the development of the SAP, including engagement with the ranching community to develop an understanding of their needs and how they manage the land.

CONCERNS:

- The partnership has identified sources of match; however, it is not clear if all the sources are secured or will align with proposed ecological objectives and OWEB's grant programs.

ADDITIONAL COMMENTS:

None

(c) The performance history and composition of the partnership.
Rating: High (-)

STRENGTHS:

- The proposal demonstrates the partnership has a clear leader and well-developed governance documents, that include information on partnership membership and the decision-making process.
- The proposal demonstrates the partnership has spent a significant amount of time planning and coordinating and has a clear vision of what they want to achieve within the FIP initiative.

- The partnership is inclusive of most local partners, including local government and the Confederated Tribes of Warm Springs.

CONCERNS:

- The partnership has significant technical expertise related to oak habitat and experience with planning, monitoring and acquisition. However, the partnership has limited experience with restoration project implementation and would benefit from additional partners with implementation experience.

ADDITIONAL COMMENTS:

None

(d) The extent to which the proposed approach will make progress toward measurable ecological outcomes.

Rating: High (-)

STRENGTHS:

- The proposal demonstrates a clear plan to incorporate existing baseline oak habitat distribution data to inform where to work and track changes over time.
- Partners have developed and started to implement a monitoring approach to establish plots and collect pre-treatment data. This will allow them to ground-truth the different model results of oak distribution.
- Given limited information about oak-dependent wildlife species, partners will evaluate the need for a checklist or species monitoring module to help build information about at-risk and/or culturally important species.
- The partnership indicates it is interested in applying a shared understanding of oak systems and the people interacting with them in an adaptive management process.
- The partnership developed separate results chains for a variety of strategies to restore East Cascade Oak Systems. These are described in detail in the partnership's Strategic Action Plan.
- The partnership's approach to identify which priority projects to implement is clearly described and grounded in an understanding of the geography and ecology.
- The proposal demonstrates a thorough understanding of limiting factors and barriers.
- The project pipeline and restoration trajectory appear logical, including the approach to tackle "low-hanging fruit" projects before moving on to more challenging projects.
- The partnership hired a landscape historian and has engaged with tribal elders to better understand the geography's historical context.
- The proposal strongly emphasizes the social aspect of the initiative and recognition of the presence of people in these ecosystems. The proposal clearly describes the human component and the importance of developing a social license for prescribed burning and reintroduction of fire into this system.

- There is a meaningful tribal partnership described in the proposal. The tribes are not only a partner, they are engaged in active restoration.

CONCERNS:

- The proposal does not contain a signed Memorandum of Understanding or charter for the partnership.
- The work plan is complex with different types of restoration in different oak habitats and works with private landowners over a large, geographically diverse landscape. It is unclear if the proposal is scaled to those complexities and whether it can be accomplished.
- The grazing results chain focuses on changing rancher's behaviors but is not clear what conservation actions will be implemented.
- While the Strategic Action Plan clearly describes the theory of change, the conservation actions described in the proposal were general and somewhat unclear.

ADDITIONAL COMMENTS:

None

(e) The ability to track progress towards proposed outcomes.

Rating: Medium

STRENGTHS:

- While the partnership does not have a final monitoring plan, they have completed a current conditions assessment and have baseline data to compare outcomes of restoration actions.
- The partnership was awarded a technical assistance grant from OWEB that will help them complete a monitoring plan by mid-2023.
- The partnership developed a monitoring tool that standardized how partners collect data in the oak landscape.
- The proposal identifies the metrics to be measured and used to inform adaptive management, despite no formal monitoring plan.
- The partnership includes the right members with the capacity and expertise to complete a monitoring plan for this work.
- The implementation results and outcomes matrix in the proposal are very well presented.
- The partnership has identified a dedicated entity for data management.

CONCERNS:

- The proposal does not clearly identify the ecological outcome indicator/metrics they will use to track the initiative's progress.
- It is not clear how the monitoring of ecological outcomes will be prioritized over the life of the initiative.

- The proposal lacks details on how current or future data collection will be managed.
- It is not clear if the GIS database described in the proposal is developed.
- The work plan for biennium 1 describes many restoration and monitoring actions, but the monitoring plan will not be complete until biennium 2.
- The proposal would benefit from a greater description of how the proposed actions will benefit species.
- The size of the geography and the goals around increasing connectivity may be difficult to measure. Some of the areas are a great distance from each other.
- Not having a completed monitoring plan makes it difficult to evaluate its merits.
- The partnership has done extensive planning and engagement, but they do not have much experience with restoration implementation.

ADDITIONAL COMMENTS:

None

(f) The scientific basis and planning tools that support the proposed Initiative.
Rating: High (-)

STRENGTHS:

- The strategic action plan is based on strong science and the partnership has helped to develop the body of knowledge.
- The partnership has used sophisticated geospatial tools to develop the strategic action plan and identify projects.
- The partnership has consulted with expert entities, including a landscape historian and tribal elders to understand the history of the geography.
- The proposal includes a description of climate impacts that incorporate observational information. It also includes climate envelope modeling and other statistical modeling.
- The proposal presents a detailed list of actions describing how the partnership will respond to climate impacts. These include the use of spatial models; the exploration of restoration methodologies; and the work to remove barriers to the use of prescribed burns. The actions include objectives to gather and utilize public engagement.
- The proposal provides a thorough description of the gap in baseline information about oak landscapes in East Cascades. The description included with this response puts the initiative's plan to explore prescribed burn associations in realistic context. The proposal notes how their efforts could ultimately facilitate the use of prescribed fire under changing public sentiment (concerns about air quality, liability).

CONCERNS:

- The proposal discusses permits and burn windows as challenges but does not describe how these challenges will be addressed.

- The species list in the proposal is incorrect. Several sub-species listed are not present in the geography.

ADDITIONAL COMMENTS:

None

(g) The extent to which the allocation of funds across proposed grant types will support the achievement of the proposed ecological outcomes.

Rating: High (-)

STRENGTHS:

- The proposal includes a variety of grant types.
- The allocation of funds between grant types is appropriate given the actions proposed through the three biennia.
- The proposal clearly outlines the strategy of their work plan, the grant types, and the timeline for project implementation.
- The budget includes a diversity of match types that amount to almost 180% of the funding request.
- There are a diversity of partners to complete restoration actions.

CONCERNS:

- While the budget includes significant match funding, the majority is associated with restoration actions. It is unclear if all sources of match funding are secure.
- A large portion of funding goes to support a single entity. This may prove a challenge if this entity is unable to continue in its role.

ADDITIONAL COMMENTS:

None

1. **Name of Initiative:** Habitat Restoration for Oregon Coast Coho Recovery in the Siuslaw River and Coastal Lakes Basins

2. **Name of Partnership:** Siuslaw Coho Partnership

3. **Application Number:** 223-8222-20126

4. **Initiative addresses the following Board-identified Priority(ies):** Coho Habitat and Populations along the Oregon Coast

5. **Initiative Abstract (from the application)**
   This initiative builds off of more than two decades of collaboration among our partner members including: Siuslaw Watershed Council, Bureau of Land Management, Siuslaw National Forest, Siuslaw Soil and Water Conservation District, Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians, Confederated Tribes of the Siletz Indians, the Oregon Department of Fish and Wildlife, and the McKenzie River Trust.

   With implementation funding, the Siuslaw Coho Partnership (SCP) will (1) implement projects outlined in our initiative which will promote the conservation and recovery of Oregon Coast coho through voluntary habitat protection and restoration efforts; (2) build the capacity of the partnership; (3) provide technical assistance for project development; (4) allow us to engage with stakeholders for watershed restoration initiatives and (5) allow the SCP to monitor the effectiveness of our efforts.

   Our ecological outcomes include (1) an increase in the quantity and quality of summer and winter rearing habitats in the initiative geography sufficient to anchor population resilience and (2) a connected assemblage of diverse habitats sufficient to foster a broad expression of life-history strategies in the Siuslaw and Coastal Lakes Oregon Coast coho populations, an OWEB board-approved priority.

6. **Budget Overview:**

Funding Period	OWEB Funding Request	Estimated Match
Biennium 1	$4,000,000	$6,771,080
Biennium 2	$4,000,000	$3,023,923
Biennium 3	$4,000,000	$2,768,002
Total	$12,000,000	$12,563,005

7. **Overall Initiative Rating:**
   (see attached evaluation criteria review worksheet for details)

Evaluation Criteria	Rating
A) Extent to which initiative addresses a board priority	N/A
B) Capacity to partner, engage the community, and catalyze additional investments	High
C) Performance history and composition of the partnership	High
D) Potential for progress toward measurable ecological outcomes	Medium (+)

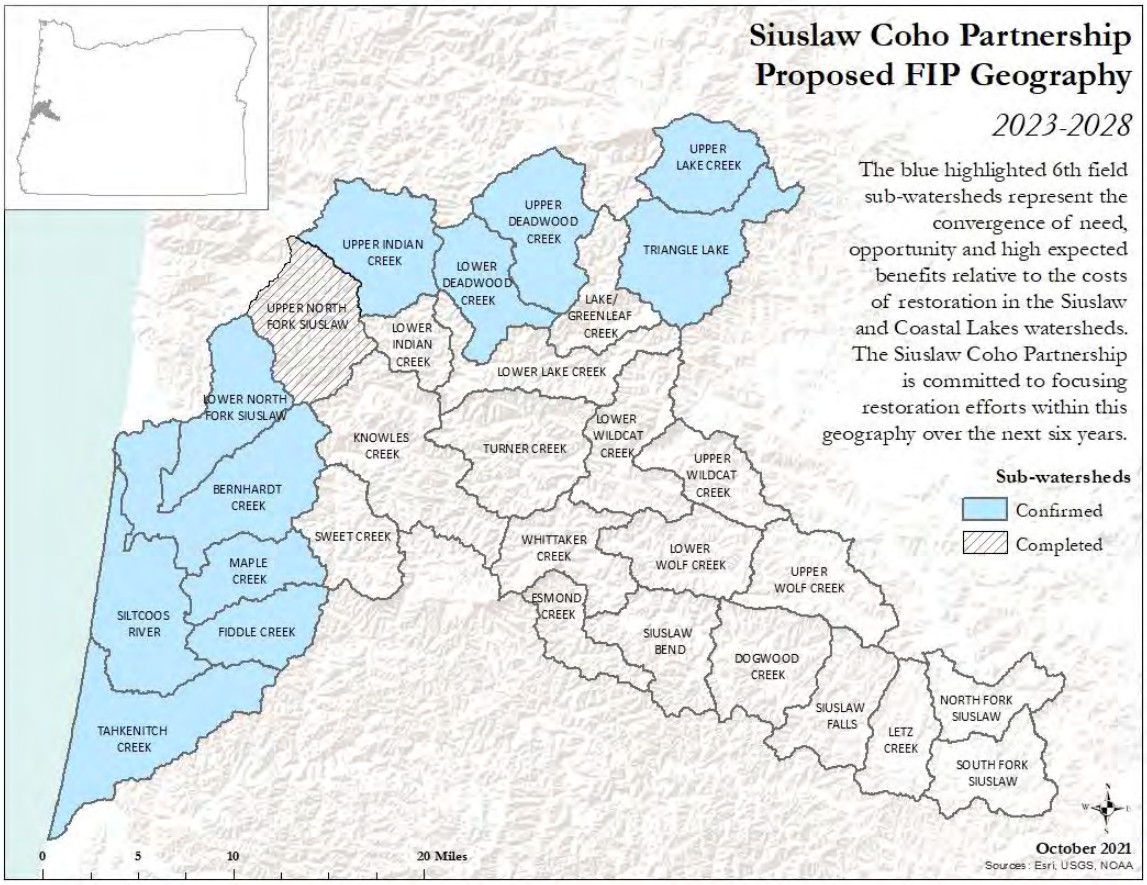
E) Ability to track progress towards proposed outcomes	Medium
F) Scientific basis and planning tools that support the proposed initiative	High (-)
G) Budget supports achieving ecological outcomes	Medium

8. **Board Committee Ranking:** 3

Attachment A: Initiative Map
Attachment B: Evaluation Criteria Ratings Worksheet

Color Maps of Siuslaw Coho Partnership Proposed FIP Geography, 2023-2028

The following section includes color maps of the proposed FIP geography for the Siuslaw and Coastal Lakes basins. The first map depicts an overview of the 11 priority sub-watersheds for the next six years (2023-2028), and the following maps depict proposed conservation actions in the sub-watersheds. The sub-watersheds include: Maple Creek, Fiddle Creek, Siltcoos Lake, Tahkenitch Lake, Lower North Fork Siuslaw River, Bernhardt Creek, Lower Deadwood Creek, Upper Deadwood Creek, Upper Indian Creek, Triangle Lake, Upper Lake Creek.



FIP Priority Review: Coho Habitat and Populations along the Oregon Coast

Name of Initiative: Habitat Restoration for Oregon Coast Coho Recovery in the Siuslaw River and Coastal Lakes Basins

Name of Partnership: Siuslaw Coho Partnership

EVALUATION CRITERIA

(a) The extent to which the initiative addresses a Board-identified priority.
Rating: This criterion will be evaluated through the OWEB Board Grants Committee

(b) The capacity to partner, engage the community, and catalyze additional investments applied to activities within the initiative geography.
Rating: High

STRENGTHS:

- The partnership worked with a consultant to build awareness of the social limiting factors associated with the FIP ecological objectives. They have used the information to develop an outreach strategy to engage the community.
- The proposed work plan demonstrates the partnership as thoughtful about each partner's strengths and distributes the work of the FIP among the partners. This increases the partnership's ability to achieve the proposed ecological outcomes.
- The Siuslaw Watershed Council, the convener of the partnership, is known for having diverse representation from within the watershed community and as being an organization that welcomes and listens to diverse voices.
- The partnership has a long history of securing funding from multiple sources, including private foundations and federal sources.

CONCERNS:

- The partnership experienced capacity issues during the COVID-19 pandemic, with staff turnover and lack of partnership coordination. The partnership is still working to fill all the necessary staff positions at the core partner organizations. It is necessary to have the capacity to achieve the proposed ecological outcomes.

ADDITIONAL COMMENTS:

None

(c) The performance history and composition of the partnership.
Rating: High

STRENGTHS:

- The partnership includes the right organizations to achieve the proposed ecological objectives and the partners have a long history of working collaboratively on outreach, planning and project implementation.
- The inclusion of McKenzie River Trust and its recent staffing expansion to the coast ensure that the partnership has the necessary skills to achieve the initiative's land acquisition goals.
- The partnership conducted extensive community engagement during the development of the SAP and included diverse landowner interests.

CONCERNS:

- The partnership has minimal engagement with large industrial forestry landowners and Oregon Department of Forestry is not listed as a partner. These two omissions leave a gap in the partnership which could impact their ability to achieve the proposed ecological outcomes.

ADDITIONAL COMMENTS:

None

(d) The extent to which the proposed approach will make progress toward measurable ecological outcomes.

Rating: Medium (+)

STRENGTHS:

- The proposal describes a well-thought-out restoration strategy and prioritization framework.
- The initiative focuses on a stronghold approach to prioritize projects in areas that are well-functioning or could be well-functioning with strategic restoration rather than focus on areas that need extensive resources to restore ecological function.
- The proposal clearly describes strategies to address limiting factors for various habitat type, including increasing channel complexity, installing large wood, and implementing riparian treatments.

CONCERNS:

- The proposal appears to be focused on government entities and would benefit from additional detail on how non-governmental organizations, local communities, and landowners are engaged.
- While the proposal discussed temperature, it would have benefited from additional description of temperature through a climate lens in this geography. The NorWEST temperature predictions that are used in the proposal, have significant limitations. It

is unclear whether the initiative's proposed work focuses on areas that will be more resilient to temperature limitations in the future.
- There is uncertainty about the expected outcomes from the Stage 0 and Stage 8 work. The proposal would benefit from additional description of the resources going toward projects with predictable outcomes versus those with less predictable outcomes and how they come together to achieve ecological uplift.

ADDITIONAL COMMENTS:
- There is uncertainty around fish passage at Triangle Lake. While this could be a good place to invest in restoration actions, the proposal does not provide clarity on the fish passage issues and makes it difficult to determine if it makes sense to invest in projects upstream of Triangle Lake at this time.
- It is unclear how warm water fish in Triangle Lake might impact the recovery of native fish following restoration actions.
- The percentage of the geography that is on public land versus private land is unclear in the proposal.

(e) The ability to track progress towards proposed outcomes.
Rating: Medium

STRENGTHS:
- Although the monitoring plan is not complete, the proposal clearly articulates how the partnership plans to track the conservation actions being implemented and the ecological outcome indicators they plan to monitor.
- The proposal also describes their plan to establish a monitoring committee and appoint a monitoring coordinator and QA officer for this initiative.
- The partnership's Theory of Change clearly links the initiative's restoration strategies to the desired conservation outputs and near, mid, and long-term ecological outcomes.
- The partnership has a current monitoring grant that funds water quality monitoring in their FIP geography.
- The proposal thoroughly describes ample baseline data currently collected and/or committed to be collected that will allow for the impacts of restoration actions to be understood.
- The partners engaged in the US Forest Service process for building programmatic monitoring for Stage 0/Stage 8 restoration. This initiative provides further opportunity to see how these projects play out in a coastal environment.

CONCERNS:
- While the proposal described project-scale monitoring and referenced some larger-scale monitoring projects, there does not appear to be monitoring of landscape-scale impacts or discussion of how they plan to apply their monitoring results in an adaptive management framework to inform future conservation and monitoring actions.

- The proposal lacks detail on how data will be managed. Without a completed monitoring plan it is difficult to evaluate the partnership's ability to track progress.

ADDITIONAL COMMENTS:

- The proposal focuses on warm summer temperatures, but would benefit from thinking more broadly about temperature monitoring and the seasonality of temperature.

(f) The scientific basis and planning tools that support the proposed Initiative.
Rating: High (-)

STRENGTHS:

- The partnership developed their strategic action plan through the Coho Business Plan process. This was a rigorous planning effort that spanned many years.
- The partnership utilized a combination of Netmap/Landscape Ecology, Modeling and Mapping Analysis modeling, anchor habitats, stronghold approach, and best professional judgment to determine their proposed geographic focus.
- The Stage 0/Stage 8 projects are built on good science and provide details that make sense. The Siuslaw Watershed Council has the experience and history of success to implement these types of projects.
- The partnership is working to finalize their theory of change in cooperation with a contractor to assist and refine the visual components.
- The proposal demonstrates an understanding of climate change impacts within the geography. It clearly describes the precipitation and hydrologic changes anticipated in the Northwest and the implications of streamflow changes and phenology on coho, including disruption in their life history if they miss cues to begin upstream migration to spawn.

CONCERNS:

- The proposal references various plans, but does not provide direct linkages to key recovery and conservation plans or clearly outline how these planning documents were used to prioritize project work.
- The Theory of Change is not part of their strategic action plan, although it is in draft form.
- The ecological justification for dune grass restoration is not clear as it relates to coho recovery.

ADDITIONAL COMMENTS:

None

(g) The extent to which the allocation of funds across proposed grant types will support the achievement of the proposed ecological outcomes.
Rating: Medium

STRENGTHS:

- The partnership proposes 100% match/leverage.
- The outreach budget for the initiative appears low; however, the partnership has engaged with the community and evolved over time.

CONCERNS:

- The proposal requests the maximum amount of funding each biennium, but it is unclear how they estimated project costs. The proposal would benefit from additional project cost details.
- The majority of the budget categories in the proposal are allocated to all partners, but it seems likely that certain partners are taking the lead role for different grant types. Not differentiating partners in the budget makes it difficult to understand distinct partner roles.

ADDITIONAL COMMENTS:

- The budget dedicated to outreach is small, but the proposal indicates that landowner outreach is an important barrier to success of the initiative. It is unclear if the budget is truly reflective of the outreach need. In particular, acquisition projects can take significant outreach time. The proposal would benefit from additional description of the landowner outreach that has already occurred.

1. **Name of Initiative:** Restoring Resilience in Two Estuaries

2. **Name of Partnership:** Oregon Central Coast Estuary Collaborative (OCCEC)

3. **Application Number:** 223-8223-20127

4. **Initiative addresses the following Board-identified Priority(ies):** Coastal Estuaries in Oregon

5. **Initiative Abstract (from the application)**
   Coastal Estuaries are a FIP priority because they are highly productive, diverse, and provide ecosystem services crucial to people and nature. Connecting forested uplands to the ocean, estuaries play a unique role, influencing landscape function across multiple habitats. Coastal resiliency to sea level rise depends upon conserving our estuaries through protection and restoration of key ecological processes and functions including hydrological connectivity, nutrient cycling and sediment transport.

   The Yaquina and Alsea estuaries have lost over 90% of their tidal swamps and significant amounts of other types of tidal wetlands. Correcting decades of degradation can be daunting, but a diverse team of Core Partners have committed to working on the priority projects identified. They come from these organizations: MidCoast Watersheds Council, Confederated Tribes of the Siletz Indians, The Wetlands Conservancy, McKenzie River Trust, Ducks Unlimited, Fred M. VanEck Forest Foundation, Pacific States Marine Fisheries Commission, ODFW, Lincoln SWCD, USFWS, BLM, and USFS.

   FIP funding will help achieve OCCEC's ecological outcomes in the Alsea and Yaquina estuaries: restoring the percentage of functional tidal wetlands through restoration (900 acres), protecting current tidal swamps and landward migration zones (100+ acres), and protecting with conservation ownerships or easements 400+ acres to allow for future restoration.

6. **Budget Overview:**

Funding Period	OWEB Funding Request	Estimated Match
Biennium 1	$1,523,000	$1,073,000
Biennium 2	$3,921,700	$2,106,000
Biennium 3	$2,390,250	$1,791,000
Total	$7,834,950	$4,970,000

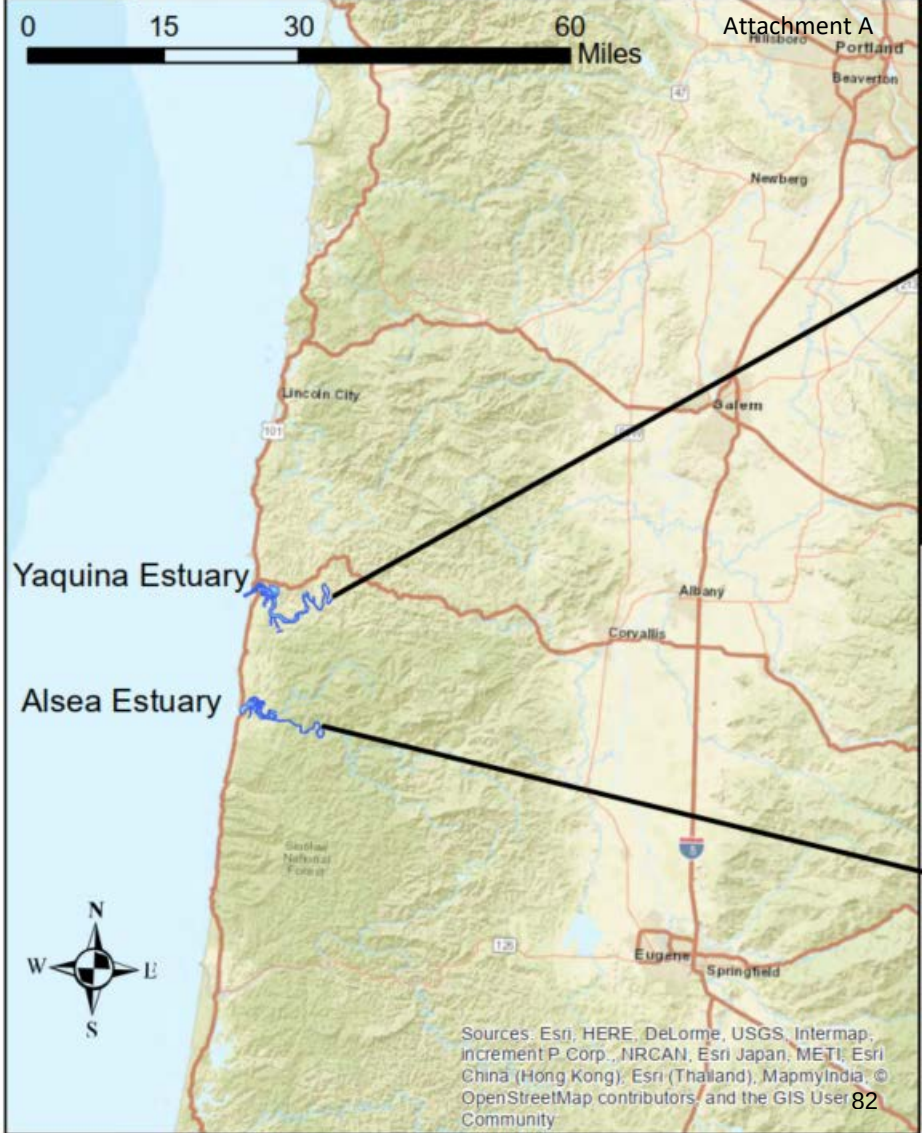
7. **Overall Initiative Rating:**
   (see attached evaluation criteria review worksheet for details)

Evaluation Criteria	Rating
A) Extent to which initiative addresses a board priority	N/A
B) Capacity to partner, engage the community, and catalyze additional investments	High

C) Performance history and composition of the partnership	High
D) Potential for progress toward measurable ecological outcomes	High (-)
E) Ability to track progress towards proposed outcomes	Medium
F) Scientific basis and planning tools that support the proposed initiative	High (-)
G) Budget supports achieving ecological outcomes	Medium

8. **Board Committee Ranking:** 3

Attachment A: Initiative Map
Attachment B: Evaluation Criteria Ratings Worksheet


0
15
30
60
Miles
Hillsboro
Portland
Beaverton
Newberg
Lincoln City
Salem
Yaquina Estuary
Albany
Corvallis
Alsea Estuary
Siuslaw National Forest
Eugene
Springfield
N
W
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FIP Priority Review: Coastal Estuaries in Oregon

Name of Initiative: Restoring Resilience to Two Estuaries

Name of Partnership: Oregon Central Coast Estuary Collaborative (OCCEC)

EVALUATION CRITERIA

(a) The extent to which the initiative addresses a Board-identified priority.
Rating: This criterion will be evaluated through the OWEB Board Grants Committee

(b) The capacity to partner, engage the community, and catalyze additional investments applied to activities within the initiative geography.
Rating: High

STRENGTHS:

- The partnership has worked with a consultant to develop a financial plan to identify state, federal and private sources of funding to support the proposed ecological outcomes identified in the FIP proposal.
- The partnership has actively engaged stakeholders and added new key members to the partnership.
- The focused approach proposed by the partnership in this FIP initiative increases the partnership's ability to work collaboratively and achieve the proposed ecological outcomes.
- The partnership has identified a leader, who has a successful track record working with OWEB.

CONCERNS:

- The partnership proposes a limited amount of funding dedicated to partnership technical assistance and does not clearly describe how the funding will be used to support the capacity of the partnership throughout the life of the FIP.
- Though the partnership has a history of successful stakeholder engagement, the proposal did not provide detail on how the partnership would engage stakeholders within the FIP geography—this is necessary to achieve the proposed ecological outcomes of the initiative.

ADDITIONAL COMMENTS:

None

(c) The performance history and composition of the partnership.
Rating: High

STRENGTHS:

- The partnership developed comprehensive governance documents that include a clear decision-making process. The partners used those documents to guide the initiative development, make decisions, and prioritize projects.

- The partners worked collaboratively on this initiative since 2016 and were able to maintain momentum and make critical decisions regarding the initiative's priorities during the pandemic— this demonstrates a committed and resilient partnership.
- The partnership is composed of natural resource professionals and technical experts that have the expertise necessary to achieve the proposed ecological outcomes. The inclusion of the Siletz Tribe in the partnership brings significant estuary expertise which will help the partnership achieves its proposed ecological outcomes.

CONCERNS:

- Some of the partnering organizations have experienced significant staff turnover during the last few years, this can cause challenges for the partnership.

ADDITIONAL COMMENTS:

None

(d) The extent to which the proposed approach will make progress toward measurable ecological outcomes.

Rating: High (-)

STRENGTHS:

- The proposal demonstrates a deep understanding of well-quantified historical conditions.
- The initiative's work plan clearly describes each project in detail (acreage, cost, geography, and narrative) and ties actions to the Oregon Conservation Strategy.
- The proposed initiative builds on a long legacy of planning, particularly in the Yaquina estuary.
- The proposal incorporates feedback received in the previous FIP proposal and builds off identified strengths.
- Coordination with the Confederated Tribes of Siletz Indians is well-articulated and tied to ecological outcomes that are relevant to the Tribe.
- The proposal clearly identifies potential challenges to the initiative as well as strategies to address these challenges.
- Given the challenges associated with land acquisition projects, the acreage goals appear to be appropriately sized to the initiative.
- The proposal describes how the initiative will build habitat restoration capacity in the region that could catalyze additional ecological uplift.

CONCERNS:

- The success of restoration outcomes relies on negotiation of land acquisitions, which can be complex and uncertain.
- It appears that restoration occurs around the fringes of the geography and that the initiative may not be able to address big ecological issues such as invasive species like eel grass, green crab, etc.

- If the tide gate removal projects trigger certain regulatory authorities (e.g. US Army Corps of Engineers Section 408 review) projects could be delayed or derailed.

ADDITIONAL COMMENTS:

None

(e) The ability to track progress towards proposed outcomes.

Rating: Medium

STRENGTHS:

- The proposal references multiple recovery, conservation, and other key plans to understand the existing baseline data and the actions and areas that the initiative targets for restoration.
- The partnership plans to collect a variety of baseline data at least one year prior to project implementation for a variety of metrics to track progress and understand if they are increasing the functional hydrologic connectivity in historic tidal wetlands.
- The proposal describes a process for the partnership to track their restoration actions to compare conservation outputs to existing data and calculate progress toward meeting restoration goals as a percentage of current and historical tidal marsh and swamp.
- The partnership has established a monitoring subcommittee and drafted a monitoring framework that is intended to help develop site-specific restoration monitoring plans in the future. For each project, the monitoring team will submit a monitoring plan to the partnership prior to project implementation.
- The partnership plans to produce annual progress reports that will summarize monitoring results. They also plan to meet annually to review interim monitoring data results and discuss any changes in action implementation and lessons learned.

CONCERNS:

- The proposal describes a 5-year interval for monitoring. This interval may not be frequent enough over the life of the FIP to result in a meaningful measure of change.
- Federal and state agencies and researchers who conduct studies in these geographies do not appear to be included on the monitoring committee. The partnership would be well-served by engaging these experts.
- The monitoring strategy appears to be focused on site and project-specific monitoring as opposed to status and trends. This may limit the ability of the partners to understand the impact of the initiative as a whole.
- The Theory of Change does not describe limiting factors or make a clear link to the restoration actions that will be implemented to address them. It also does not include a connection to the metrics they plan to monitor in their draft monitoring framework.
- There appears to be inconsistencies in the ecological outcome metrics listed in the draft monitoring framework, the strategic action plan, and the proposal.

- The proposal does not clearly describe how the monitoring or implementation data will be managed to track goals over time.

ADDITIONAL COMMENTS:

None

(f) The scientific basis and planning tools that support the proposed Initiative.
Rating: High (-)

STRENGTHS:

- The partnership refined their geography and appears to work strategically in high-priority geographies.
- The proposal references numerous planning documents to support their work, including references to climate change considerations.
- The emphasis on projects that are "low-hanging fruit" seem appropriate given the complex nature of estuarine projects.
- The proposal clearly incorporates climate considerations and describes the implications for sea-level rise (one of the key limiting factors described in the OWEB Priority Memo for Coastal Estuaries). The proposal describes how restoration activities for tidal wetlands will ameliorate these impacts.
- The proposal is closely tied to the Oregon Conservation Strategy and includes recommendations from the Oregon Global Warming Commission's 2021 recommendation for a carbon sequestration goal.

CONCERNS:

- Large sections of the coast are hardened (rip-rapped). The challenges associated with this are not well-addressed in the proposal.
- Although the proposal indicates that the partnership and initiative are focused on enhancing the resilience of estuarine habitats in the face of climate change, the proposal does not provide details or refer to how this happens.

ADDITIONAL COMMENTS:

None

(g) The extent to which the allocation of funds across proposed grant types will support the achievement of the proposed ecological outcomes.
Rating: Medium

STRENGTHS:

- The proposed budget allocates funds to a diversity of partners.

CONCERNS:

- The budget for monitoring appears low given the scope of proposed work and the complexities of the ecology within the proposed geography.

- The investment in partnership capacity may not be adequate to complete the work outlined in the work plan.

ADDITIONAL COMMENTS:

None

1. **Name of Initiative:** Oregon Model to Project Sage-Grouse, All Counties Phase II

2. **Name of Partnership:** Oregon All Counties CCAA Steering Committee

3. **Application Number:** 223-8224-20128

4. **Initiative addresses the following Board-identified Priority(ies):** Sagebrush/Sage-steppe Habitat

5. **Initiative Abstract (from the application)**

The Oregon All Counties Candidate Conservation Agreements with Assurances Steering Committee (Partnership), includes the following core partners: Crook County Soil and Water Conservation District (SWCD), Harney SWCD, Lakeview SWCD, Malheur County SWCD, Baker County's Powder Basin Watershed Council (PBWC), U.S. Fish and Wildlife Service (USFWS), and private landowners from each county. The Partnership's primary ecological outcome includes strategically planning and implementing conservation treatments on a landscape scale to restore Oregon's private rangeland sagebrush-steppe rangelands and to ultimately restore ecological health and increase sage-grouse populations. The Partnership conducts its work through the framework of six Programmatic CCAAs which are formal agreements with USFWS. Under the Programmatic CCAAs, the Partnership engages private landowners in voluntary conservation actions in exchange for certain assurances should sage-grouse be listed under the Endangered Species Act (ESA). After six years of planning and implementation success, the Partnership seeks additional FIP funding to achieve long term goals outlined in the Oregon *All Counties Steering Committee Strategic Action Plan* (SAP, OACSC updated 2021) and fulfill capacity needs critical to our success.

The Partnership will implement the following actions:

1) Reduce wildfire risk,

2) Treat invasive annual grasses/noxious weeds and augment understory vegetation,

3) Address juniper/conifer encroachment,

4) Improve grazing management strategies,

5) Plan and implement actions to connect fragmented habitat, and

6) Enhance mesic habitat.

Our goals are directly aligned with the OWEB board-approved "Sagebrush/Sage-Steppe Habitat" priority because our: geography is located within high priority areas identified by each county and connects to other sage-grouse "strongholds" within the focal planning area; actions address the primary ecological threats to sagebrush habitats; and the SAP is designed to improve ecosystem function specifically for sage-grouse.

6. **Budget Overview:**

Funding Period	OWEB Funding Request	Estimated Match
Biennium 1	$4,000,000	$3,000,000
Biennium 2	$4,000,000	$3,000,000
Biennium 3	$4,000,000	$3,000,000

Total	$12,000,000	$9,000,000

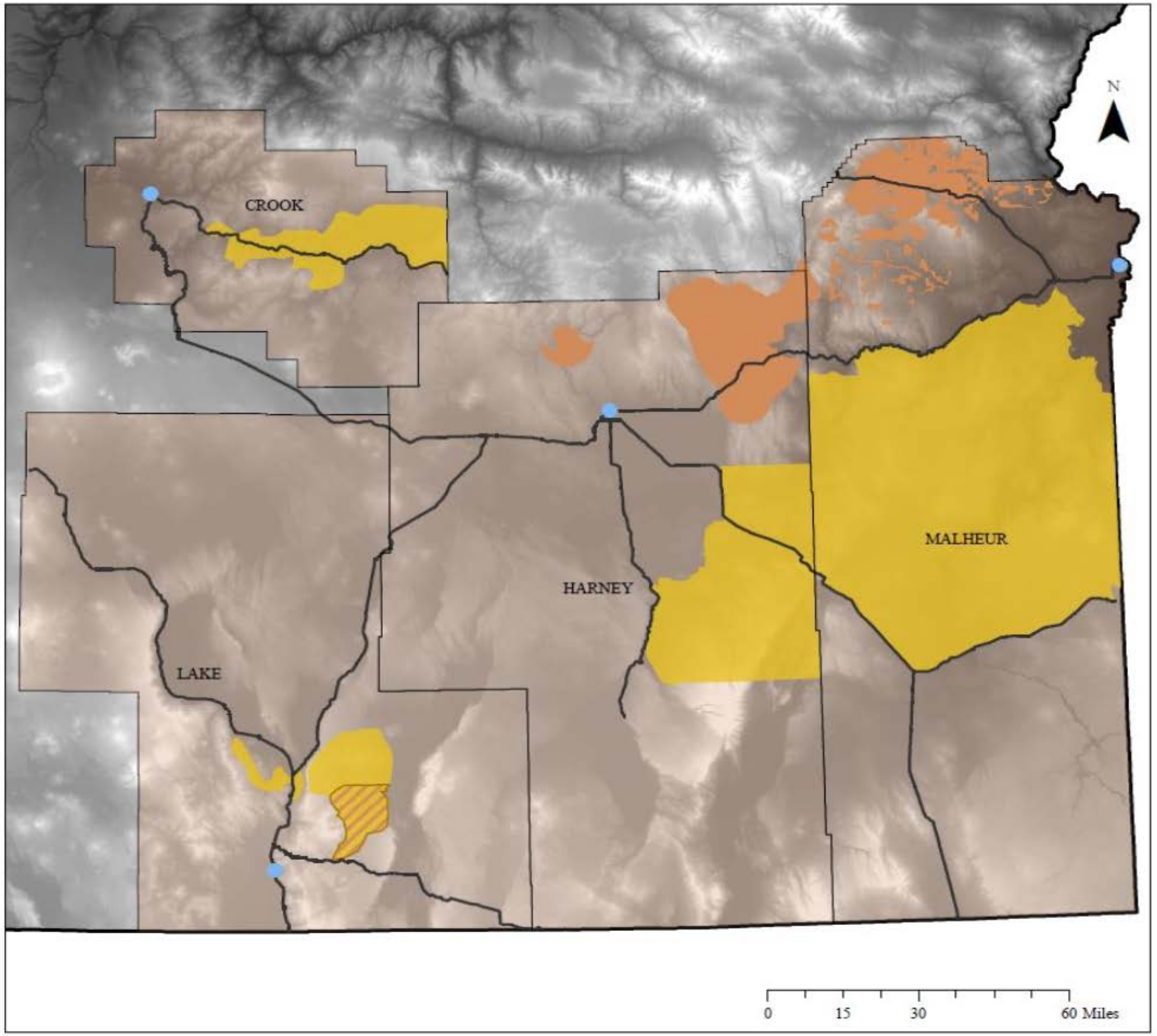
7. Overall Initiative Rating:
(see attached evaluation criteria review worksheet for details)

Evaluation Criteria	**Rating**
A) Extent to which initiative addresses a board priority	N/A
B) Capacity to partner, engage the community, and catalyze additional investments	Medium
C) Performance history and composition of the partnership	Medium
D) Potential for progress toward measurable ecological outcomes	High (-)
E) Ability to track progress towards proposed outcomes	High (-)
F) Scientific basis and planning tools that support the proposed initiative	High (-)
G) Budget supports achieving ecological outcomes	Medium

8. Board Committee Ranking: 9

Attachment A: Initiative Map
Attachment B: Evaluation Criteria Ratings Worksheet

Figure 2: FIP Focal Area Geography.

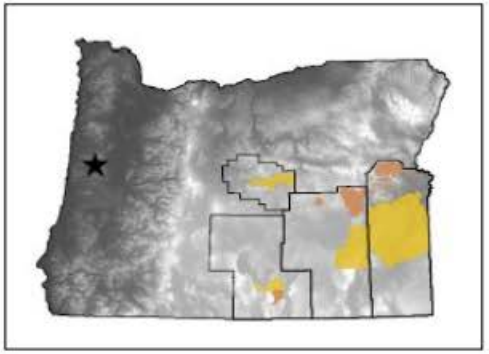


Oregon All County CCAA Steering Committee Initiative

CCAA Holders

Phase 1 FIP Geography

Phase 2 FIP Geography



FIP Priority Review: Sagebrush/Sage-steppe Habitat

Name of Initiative: Oregon Model to Project Sage-Grouse, All Counties Phase II

Name of Partnership: Oregon All Counties CCAA Steering Committee

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EVALUATION CRITERIA

(a) The extent to which the initiative addresses a Board-identified priority.
Rating: This criterion will be evaluated through the OWEB Board Grants Committee

(b) The capacity to partner, engage the community, and catalyze additional investments applied to activities within the initiative geography.
Rating: Medium

STRENGTHS:

- The proposal covers a large geographic area and partners coordinate with landowners and the appropriate federal agencies to achieve landscape-scale outcomes.
- The proposal demonstrates the partnership has a plan for catalyzing additional funding opportunities, and the funding would help achieve the proposed ecological outcomes.

CONCERNS:

- It is unclear from the proposal how the partnership makes funding decisions. It appears that funding is equally distributed across all the partners engaged in the proposal, which does not demonstrate prioritization of projects or strategic planning.
- The proposal does not clearly describe the roles and responsibilities of the partners, including how collaboration and coordination occurs across the initiative's large geography.
- The proposal lists community partners but lacks detail on how those community partners will be engaged in the initiative.

ADDITIONAL COMMENTS:

None

(c) The performance history and composition of the partnership.
Rating: Medium

STRENGTHS:

- Through their previously awarded FIP initiative, the partnership has clearly demonstrated the ability to implement conservation measures in core sage-grouse habitat.
- The composition of the partnership supports the proposed ecological outcomes of the FIP initiative.

CONCERNS:

- The partnership has a very basic governance document, which does not address changes in partnership leadership or turnover at partner organizations. This could limit the ability of the partnership to successfully collaborate and achieve the proposed ecological outcomes over the course of the initiative.
- Due to the nature of the work and agreements in place, this is a small partnership that works on very specific deliverables related to sage-grouse conservation. It is not clear from the proposal if this is a truly collaborative partnership, or a group of organizations with a collective plan and funding that work separately to achieve ecological outcomes.

ADDITIONAL COMMENTS:

None

(d) The extent to which the proposed approach will make progress toward measurable ecological outcomes.

Rating: High (-)

STRENGTHS:

- The partnership works with an incentive program, Candidate Conservation Agreement with Assurances (CCAA), to enter into 30-year agreements between the U.S. Fish and Wildlife Service (USFWS) and private landowners where land is managed to reduce threats to sage-grouse. In return for managing their land to benefit sage-grouse, landowners receive assurances against regulatory requirements if the sage-grouse is listed under the federal Endangered Species Act.
- CCAAs are an appropriate vehicle that help assure out-year management on land that has undergone publicly funded restoration actions.
- The partnership seeks to build on the successes achieved during their previously awarded FIP initiative which saw them meet and exceed ecological outputs related to juniper control and invasive annual grass treatments amongst other activities.
- The partnership engages partners with technical expertise to help them achieve success at a landscape level.
- Through the CCAA process, site specific planning with landowners occurs, which creates durable products for long-term private lands conservation.
- Landowner interest in the CCAA program is high, as demonstrated by numerous letters of intent for landowners to enroll 160,000 acres in the program.

CONCERNS:

- In an era of changing climate and catastrophic wildfire, sage-grouse habitat conditions may be deteriorating faster than restoration and conservation efforts can keep up.
- Success of the proposed treatments depends on restoring vast landscapes of public and private land. A patchwork of restoration may have limited long-term benefits if

invasive annual grasses continue to proliferate across the range and move into previously restored areas.
- Within the focus areas of the proposed initiative, the partnership intends to prioritize work where prior restoration efforts have occurred; however, it is unclear what the partners would do with a landowner who is interested in the CCAA program and has property in a low priority area for sage-grouse conservation.

ADDITIONAL COMMENTS:
- Staff capacity is a limiting factor. The initiative covers a large geographic area, and it is challenging to secure sufficient long-term funding for qualified staff.
- Landowner confidentiality within the CCAA program makes it a challenge to share relevant location information with funders and partners.

(e) The ability to track progress towards proposed outcomes.
Rating: High (-)

STRENGTHS:
- The partnership developed an effective data collection and management system that features the use of field tablets, a database to upload data and photo points, and the ability to have a complete record for each property treated.
- The partnership, in cooperation with USFWS, developed a reporting database for conservation actions implemented through the CCAA program.
- The partnership developed an adaptive management model, informed by the monitoring of previously implemented conservation work.
- Site-specific monitoring that occurs at the pasture level can be rolled up to whole CCAA scale and into sage-grouse reporting units. Monitoring data also feeds into larger USFWS efforts and can be integrated with statewide partnership.
- The partnership utilizes a well-vetted, threats-based matrix to plan conservation at individual sites.

CONCERNS:
- Much of the monitoring implemented by the partnership is at the project level and may not capture larger landscape trends. Additionally, the partnership often relies on qualitative data (e.g., photo point monitoring), and more quantifiable data would strengthen their monitoring approach.
- It is unclear whether control sites have been established for monitoring purposes. Given the changing landscape over time, a lack of control sites may be problematic.
- With landowner confidentially issues, it is difficult for those outside the partnership to track the effectiveness of individual treatments. Due to the same confidentially issues, it is also challenging to place conservation work in context with complementary actions done on federal land.
- The proposal does not describe how the partnership will monitor how sage-grouse respond to the proposed conservation treatments.

ADDITIONAL COMMENTS:

None

(f) The scientific basis and planning tools that support the proposed Initiative.

Rating: High (-)

STRENGTHS:

- The proposal refers to relevant sage-grouse conservation planning materials, as well as online technical tools that have been developed in recent years.
- The proposed juniper treatment planning is straightforward and accounts for habitat fragmentation and may also reduce catastrophic wildfire risks. Implemented correctly, this will build sagebrush habitat for the future.
- The threats-based model used by the partnership will be deployed every five years at conservation sites, which will allow for collecting data on ecological trends.

CONCERNS:

- The proposal contains some discrepancies on the number of acres that are proposed for invasive annual grass and juniper treatments.
- The proposal references threats from juniper and invasive annual grasses that far exceed the acreage intended to be treated through the initiative. Therefore, it unclear whether the treatments will have a demonstrable impact to sage-grouse populations.

ADDITIONAL COMMENTS:

None

(g) The extent to which the allocation of funds across proposed grant types will support the achievement of the proposed ecological outcomes.

Rating: Medium

STRENGTHS:

- The CCAA program is an appropriate vehicle for multiyear management of sage-grouse conservation on private land, with assurances to maintain public investments.
- The proposal identifies the capacity to provide technical assistance and monitoring as a limiting factor and allocates funding for the important positions to carry out this work.

CONCERNS:

- There is inconsistency in the match/leverage figures used throughout the proposal.
- It is unclear how BLM match funding will be allocated within the three BLM districts covered in the initiative geography.
- The budget over the life of the initiative is uniform for each biennium. This indicates that the partners may not have taken the long-term evolution of grant needs into consideration.

ADDITIONAL COMMENTS:

None

1. **Name of Initiative:** Salmon SuperHwy Native Fish Habitat Reconnection

2. **Name of Partnership:** Salmon SuperHwy Partnership

3. **Application Number:** 223-8255-20129

4. **Initiative addresses the following Board-identified Priority(ies):** Aquatic Habitat for Native Fish Species

5. **Initiative Abstract (from the application)**

The Salmon SuperHwy (SALMON SUPERHWY) partnership is an effective team of federal, state, and local agencies and organizations working together to restore fish passage at high priority man-made barriers and reconnect **Aquatic Habitat for Native Fish** in the Tillamook, Nestucca, and Sand Lake watersheds. Core partners include USDA Forest Service, US Fish and Wildlife Service, Bureau of Land Management, Natural Resource Conservation Service, Tillamook County, Tillamook Estuaries Partnership, Nestucca Neskowin Sand Lake Watersheds Council, Oregon Department of Forestry, Oregon Department of Fish and Wildlife, and Oregon Department of Transportation.

In addition to providing valuable social and economic outcomes, the SALMON SUPERHWY is working to achieve the following ecological outcomes.

- Native fish will have unobstructed access into at least 95% of their historic habitat.
- Improved river and stream connectivity will enhance watershed and habitat forming processes, including downstream transport of essential flows, sediment, and wood and free movement of anadromous fish and other aquatic organisms.

Building on the momentum of several successful years of project implementation, the partnership will use FIP funding to increase the leveraging of resources and accelerate the pace of project implementation to bring the program to successful completion, full reconnection of 180 miles of priority fish habitat.

6. **Budget Overview:**

Funding Period	OWEB Funding Request	Estimated Match
Biennium 1	$3,000,000	$5,588,800
Biennium 2	$3,153,000	$18,221,000
Biennium 3	$3,153,000	$12,807,000
Total	**$9,306,000**	**$35,616,800**

7. **Overall Initiative Rating:**

(see attached evaluation criteria review worksheet for details)

Evaluation Criteria	Rating
A) Extent to which initiative addresses a board priority	N/A
B) Capacity to partner, engage the community, and catalyze additional investments	High
C) Performance history and composition of the partnership	High
D) Potential for progress toward measurable ecological outcomes	Medium (+)

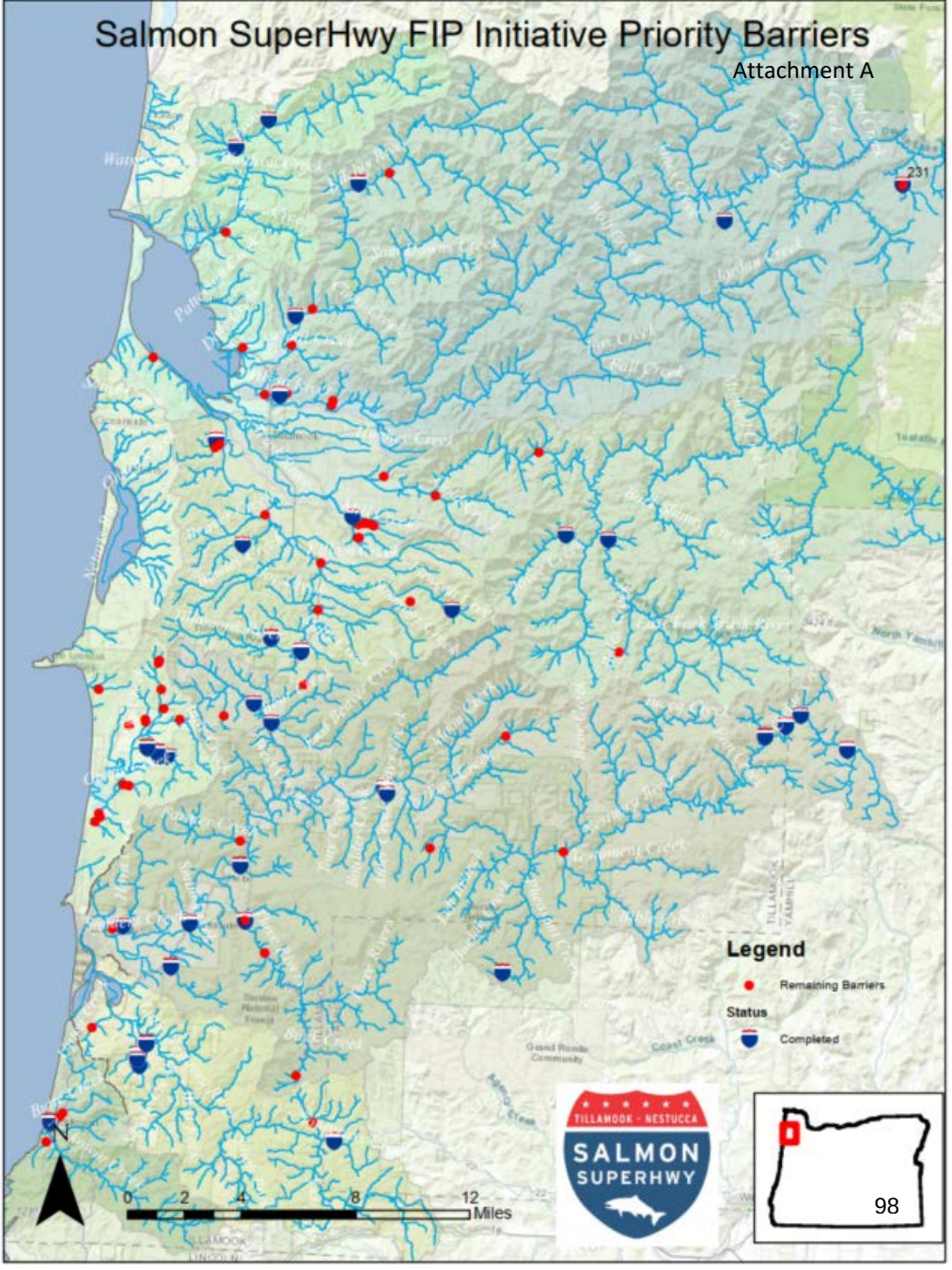
E) Ability to track progress towards proposed outcomes	Medium
F) Scientific basis and planning tools that support the proposed initiative	Medium
G) Budget supports achieving ecological outcomes	Medium (+)

8. **Board Committee Ranking:** 10

Attachment A: Initiative Map
Attachment B: Evaluation Criteria Ratings Worksheet

Salmon SuperHwy FIP Initiative Priority Barriers

Attachment A



FIP Priority Review: Aquatic Habitat for Native Fish Species

Name of Initiative: Salmon SuperHwy Native Fish Habitat Reconnection

Name of Partnership: Salmon SuperHwy Partnership

EVALUATION CRITERIA

(a) The extent to which the initiative addresses a Board-identified priority.
Rating: This criterion will be evaluated through the OWEB Board Grants Committee

(b) The capacity to partner, engage the community, and catalyze additional investments applied to activities within the initiative geography.
Rating: High

STRENGTHS:

- The partnership has developed and implemented a fundraising plan, which includes private fundraising, and has a history of success in receiving funding from both public and private sources.
- The partnership has a communication strategy and has been successful in using the strategy to tell the story of their work.
- The actions proposed in the FIP work plan are distributed among the different partners, resulting in engagement across project partners at all levels of the partnership.

CONCERNS:

- The partnership's reliance on one organization for coordination might impact the resiliency of the partnership if there is turnover within the organization; however, since the implementation of projects is spread among the partners it is likely that turnover would not impact the partnership's ability to achieve the proposed ecological objectives.

ADDITIONAL COMMENTS:

- Initiative includes desired social outcomes and partners have a successful community outreach strategy, including local business support and an engaging website.
- Before COVID, the partners regularly led project site tours, it would be nice to see these restarted when safely possible.

(c) The performance history and composition of the partnership.
Rating: High

STRENGTHS:

- The partners have been collaborating for more than a decade, have developed a detailed project prioritization plan, and have a decision-making structure to address operational issues and shared financial resources.
- The application clearly describes the roles and responsibilities of core partners, and partners have the right expertise to successfully achieve the proposed ecological objectives.
- The application clearly describes the partnership's plan if turnover occurs from within the core partners.

CONCERNS:

- Neither tribal governments, private timber owners nor NOAA Fisheries are engaged in the partnership. It is unclear from the proposal how the partnership will engage with these groups in the future.

ADDITIONAL COMMENTS:

None

(d) The extent to which the proposed approach will make progress toward measurable ecological outcomes.

Rating: Medium (+)

STRENGTHS:

- Restoring access to 180 miles or 95% of historical habitat for native fish in the regionally significant Tillamook and Nestucca watersheds, would be a noteworthy accomplishment and has a high likelihood of being achieved within the FIP timeframe.
- The project benefits all coastal salmonid species, including ESA-listed species. and Pacific lamprey.
- The partnership's prioritization methodology considers habitat benefits and project cost.
- The proposed fish passage work has the potential to benefit/complement other restoration efforts in the region.
- The application describes how climate-resilient infrastructure benefits fish passage, minimizes aquatic species vulnerability to catastrophic events (e.g., ability to migrate further upstream during warm water periods), and improves road safety for drivers.
- The application provides a good explanation of the proposed initiative's benefits to infrastructure/aquatic species to mitigate for climate change impacts by upsizing replacement structures.

CONCERNS:

- The partnership demonstrates an approach to achieve conservation outputs that support the proposed ecological outcomes; however, partners have, or soon will have, implemented 51 of the 93 priority projects and reconnected 129 miles of the 180 miles of prioritized habitat. Achieving the initiative's goal to address fish passage at remaining identified barriers is expensive, with diminishing returns at some sites where the available habitat upstream is a fraction of a mile.
- The proposal has a narrow focus on fish passage and does not describe other species that could benefit from these projects.
- The proposal could better describe the ecological benefits achieved through project implementation at partial fish passage barriers and how the partnership's prioritization method evaluates partial barriers.
- The application does not demonstrate how barrier removal alone restores channel process and function and lacks a description of ecological benefits beyond miles of habitat reconnected.
- There are some unknowns on project feasibility at sites where they cannot get access/landowner support.

ADDITIONAL COMMENTS:

- Oregon Department of Fish and Wildlife (ODFW) 2019 Statewide Fish Passage Barrier Priority List is not referenced in the application; most of the barriers in the application are not on that list.
- The partnership previously received FIP capacity funding to develop a charter, governance documents, and a process to manage partner turnover.

(e) The ability to track progress towards proposed outcomes.
Rating: Medium

STRENGTHS:

- Baseline information available from two culvert prioritization plans provide a wealth of control data and information for individual sites.
- The theory of change outlines an adequate approach to monitor the proposed conservation outputs and provides a visual representation of the ecological and economic benefits of the restoration strategy.
- Implementation monitoring is well described in the application, effectiveness monitoring is being conducted via the U.S. Forest Service Aquatic and Riparian Effectiveness Monitoring Program (AREMP).
- The partnership has a staff person to coordinate monitoring activities and maintain a database that is shared with partners.

CONCERNS:

- Monitoring described in the application does not track ecological outcome indicators beyond fish passage. No objectives or metrics are identified to monitor the

initiative's other objectives: restoration of natural stream processes, tidal connectivity and infrastructure resilience.

- The application lacks a description of juvenile or adult fish data that could be used to track progress towards meeting ecological outcomes.
- There is no monitoring proposed to track progress towards meeting social and economic indicators identified in the results chain/theory of change.
- The proposal does not describe how the different implementation and monitoring data will be managed, analyzed, and interpreted to ensure it can be used to describe the initiative's progress toward meeting ecological outcomes.

ADDITIONAL COMMENTS:

None

(f) The scientific basis and planning tools that support the proposed Initiative.
Rating: Medium

STRENGTHS:

- The proposal demonstrates that the proposed initiative is in alignment with relevant management and planning documents.
- The project partnership includes experienced federal staff to provide permitting and project implementation support.

CONCERNS:

- The proposal is unclear on how projects are prioritized beyond being initially identified as one of the 93 targeted projects.
- The proposal does not provide a rationale for why restoring fish passage to 95% of historic habitat is the optimal threshold.
- It is unclear if the partnership intends to replace barriers upstream from barriers where access is not being addressed.
- The proposal lacks an explanation for the ecological benefit of addressing expensive partial fish barriers with limited amounts of upstream habitat.
- The proposal does not provide a scientific basis for the initiative's sole focus on fish passage.

ADDITIONAL COMMENTS:

- The proposal describes how a 15-year flood event would trigger certain monitoring efforts, however the Strategic Action Plan is ambiguous in stating that the partnership "may" monitor at 15-year flood events. The proposal does not include a rationale for selection of the 15-year flood event as a trigger for this monitoring.
- The Optipass model used by the partnership treats all barriers as full barriers. However, many remaining barriers are partial barriers. Has there been any partnership discussion about the merits of addressing partial barriers?

(g) The extent to which the allocation of funds across proposed grant types will support the achievement of the proposed ecological outcomes.
Rating: Medium (+)

STRENGTHS:

- The partners identify funding as a limiting factor and have developed a fundraising plan that includes multiple sources of potential and secured match.
- ODOT is identified as a partner showing meaningful match, which is appropriate since many of the proposed projects are under ODOT ownership.
- The funding request is targeted and focused on fish passage barriers.

CONCERNS:

- The monitoring budget at $15,000 per year is very modest even given that the partnership is utilizing the U.S. Forest Service to conduct monitoring via the Aquatic and Riparian Effectiveness Monitoring Program (AREMP).
- The budget for stakeholder engagement in each biennium of the proposal is low, which might impact the partners' community engagement work.

ADDITIONAL COMMENTS:

- Non-federal funding is needed to leverage potential federal funding that may come through the recent federal infrastructure bill.

1. **Name of Initiative:** Tenmile Lakes Native Fisheries and Water Quality Restoration Plan

2. **Name of Partnership:** Ten Mile Lakes Steering Committee

3. **Application Number:** 223-8216-20120

4. **Initiative addresses the following Board-identified Priority(ies):** Coho Habitat and Populations along the Oregon Coast

5. **Initiative Abstract (from the application)**
   Initiative partners are: Coos County, Confederated Tribes of the Coos, Lower Umpqua, and Siuslaw Indians (CTCLUSI), Tenmile Lakes Basin Partnership, Oregon Department of State Lands, Fish and Wildlife, Environmental Quality, City of Lakeside, Wild Rivers Land Trust, Tenmile Lake Association, Willamette Partnership, and Cascade Pacific Resource and Development. The partners overall priority is to restore where possible, natural functions to improve water quality and habitat for native fisheries in the Tenmile Lakes subbasin. Where not possible, implement enhancement actions that work within the land-use to reduce impacts to the watershed. FIP funding will be utilized to: 1)increase the monitoring and analysis capacity of CTCLUSI, 2) landowner outreach, 3) conduct due diligence and purchase two properties, in the Big and Johnson Creek subbasin, totaling 399 acres, 4) Engineer wetland restoration designs and implement on the two acquired properties, 5) transfer title of the two properties to CTCLUSI, 6) Engineer designs and restore 60 acres to Wetland voluntarily with Landowner in the Benson Creek subbasin, and 7) construct 4 miles of exclusion fencing above priority wetlands in the Johnson and Benson subbasins. Funding will address all FIP Coho Habitat priorities and key limiting factors in a high priority coastal Lakes watershed.

6. **Budget Overview:**

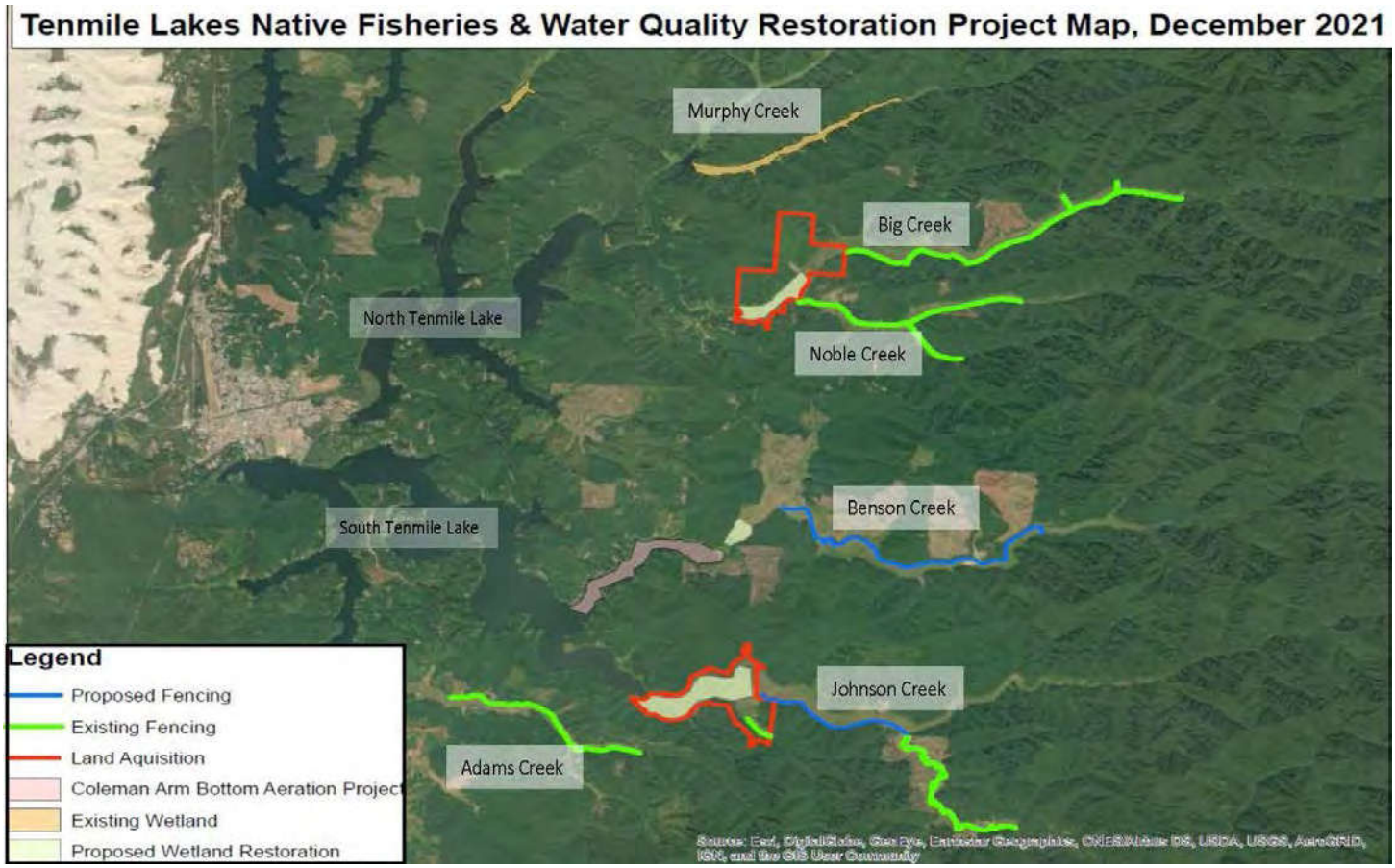
Funding Period	OWEB Funding Request	Estimated Match
Biennium 1	$743,421	$420,544
Biennium 2	$1,149,490	$308,057
Biennium 3	$1,736,620	$178,782
Total	$3,629,531	$907,383

7. **Overall Initiative Rating:**
   (see attached evaluation criteria review worksheet for details)

Evaluation Criteria	Rating
A) Extent to which initiative addresses a board priority	N/A
B) Capacity to partner, engage the community, and catalyze additional investments	Medium
C) Performance history and composition of the partnership	Medium
D) Potential for progress toward measurable ecological outcomes	Medium (-)
E) Ability to track progress towards proposed outcomes	Low (+)
F) Scientific basis and planning tools that support the proposed initiative	Medium
G) Budget supports achieving ecological outcomes	Medium (+)

8. **Board Committee Ranking:** 11

Attachment A: Initiative Map
Attachment B: Evaluation Criteria Ratings Worksheet


Tenmile Lakes Native Fisheries & Water Quality Restoration Project Map, December 2021
Murphy Creek
Big Creek
North Tenmile Lake
Noble Creek
Benson Creek
South Tenmile Lake
Johnson Creek
Adams Creek
Legend
Proposed Fencing
Existing Fencing
Land Aquisition
Coleman Arm Bottom Aeration Project
Existing Wetland
Proposed Wetland Restoration

FIP Priority Review: Coho Habitat and Populations along the Oregon Coast

Name of Initiative: Tenmile Lakes Native Fisheries and Water Quality Restoration Plan

Name of Partnership: Tenmile Lakes Steering Committee

EVALUATION CRITERIA

(a) The extent to which the initiative addresses a Board-identified priority.
Rating: This criterion will be evaluated through the OWEB Board Grants Committee

(b) The capacity to partner, engage the community, and catalyze additional investments applied to activities within the initiative geography.
Rating: Medium

STRENGTHS:

- The partners demonstrate a strong commitment to the proposed ecological outcomes and have a history of engaging with the community on these complex issues.
- The proposal clearly describes the roles and responsibilities of the partners, and the structure seems appropriate given the community, the partners, and their history of working together.

CONCERNS:

- The proposal does not clearly describe the partnership's decision-making process, including how the projects listed in the work plan were prioritized.
- The partnership did not demonstrate that it has a plan to catalyze additional investments to support the proposed ecological outcomes.
- The proposed FIP geography includes significant agricultural land, specifically around the lake, but the partnership does not include agricultural representatives.

ADDITIONAL COMMENTS:

None

(c) The performance history and composition of the partnership.
Rating: Medium (-)

STRENGTHS:

- The partnership has worked collaboratively for more than 20 years and has demonstrated broad community support, including support and leadership from the County Commissioners and the Confederated Tribes of the Coos, Lower Umpqua, and Siuslaw Indians.
- The partners have a history of successful collaboration to plan, restore, and monitor projects and share a common vision to address water quality concerns in the FIP geography.

CONCERNS:

- The partnership is missing some local partners, including the Coos Soil and Water Conservation District, and does not explain why these partners are not involved nor does the proposal describe a process to bring on new partners.
- The partnership does not have a history of implementing acquisition projects, which are a significant component of the proposed work plan.

ADDITIONAL COMMENTS:

None

(d) The extent to which the proposed approach will make progress toward measurable ecological outcomes.

Rating: Medium (-)

STRENGTHS:

- The proposal clearly describes the process to select priority projects given the basin's limiting factors.
- The proposed land acquisition parcels are justified and timely.
- The Tenmile Lakes Basin is relatively small with a focused geography.
- The partnership has a track record of success to implement Open Solicitation grant program projects.

CONCERNS:

- The proposal would benefit from additional detail on the activities to be implemented to restore wetlands.
- The proposal would benefit from additional description of proposed upstream restoration actions and resultant downstream benefits.
- Flow restoration is mentioned in the restoration plan, but not discussed in the proposal.
- The partnership appears to be divided into different teams—not all the teams are represented in this initiative. The proposal would benefit from full participation.
- The proposal states that beaver will return to the area within 5 years of implementation, but it is unclear how that will happen without any active beaver restoration effort.
- The proposal does not clearly describe the proposed restoration activities. This makes it difficult to understand the proposed ecological outcomes including fish outputs and measurable benefits to water quality.
- The proposal did not address non-native predatory fish.
- While the funding to support the pilot project air compressor aeration system is from partner matching funds, the technology as a long-term restoration strategy is a concern.

ADDITIONAL COMMENTS:

None

(e) The ability to track progress towards proposed outcomes.

Rating: Low (+)

STRENGTHS:

- The proposed funding will support a lab technician and monitoring staff.
- While the proposal lacked detail on baseline data, the partnership has a history of monitoring in the watershed and has accumulated baseline data on water chemistry and sediment impacts.

CONCERNS:

- The proposal's description of baseline data is very limited and does not include Tenmile Lake Basin Partnership data collected from 2004 – 2015 with OWEB monitoring grants.
- The proposal did not include a description of fisheries and fish habitat data that Oregon Department of Fish and Wildlife (ODFW) has collected.
- The shade and habitat objectives described in the proposal do not appear to have a monitoring plan associated with them.
- The Soil and Water Assessment Tool (SWAT) model used to evaluate the benefits of some of the proposed restoration work may be insufficient. The modeling for dissolved nutrient reduction is uncertain.
- The proposal lists what water quality parameters will be collected, but does not list the metrics that will be calculated.
- There is no monitoring for habitat or invasive/native fish in the FIP proposal that would allow progress tracking towards meeting habitat and fish outcomes described in the proposal.
- The proposal does not describe how data will be analyzed. The proposal states that data will be compared to state standards and to the previous year's data set, but it was not clear if the monitoring sites will be located in proximity to the restoration projects to detect a change, or if each restoration site will have pre—and post—project monitoring.
- There is no information on the monitoring study design to describe if before and after restoration project monitoring data will be collected and how monitoring sites will be located to track restoration actions.

ADDITIONAL COMMENTS:

None

(f) The scientific basis and planning tools that support the proposed Initiative.

Rating: Medium

STRENGTHS:

- The proposal clearly describes the basis for project selection and proposed restoration areas.
- Placing priority areas under tribal ownership will result in long-term stewardship and long-term planning.

CONCERNS:

- While baseline water quality data was collected, it is unclear whether the parameters are sufficient. The proposal would benefit from additional detail on baseline data.
- One of the partnership's goals is to achieve a specific dissolved oxygen saturation level, but it is unclear if they will collect dissolved oxygen saturation data.
- The proposal does not appear to include collection of secchi disk data, which is important in lake systems.
- Throughout the proposal many different limiting factors were mentioned. This made it unclear if there is a true understanding of the watershed's limiting factors.
- The proposal did not provide technical references to describe the basis for anticipated outcomes.
- The implementation metrics listed in the FIP proposal do not match the Strategic Action Plan's progress monitoring framework.

ADDITIONAL COMMENTS:

None

(g) The extent to which the allocation of funds across proposed grant types will support the achievement of the proposed ecological outcomes.

Rating: Medium (+)

STRENGTHS:

- The partners propose a modest budget with funding dedicated to support monitoring staff.
- Based on the work plan, the budget appears appropriate.
- A low outreach budget reflects landowner engagement and community outreach that partners have already completed and is appropriate for the initiative.
- While the proposal includes significant resources for land acquisition, channel decommissioning work can still be successful and meaningful in the absence of land acquisition.

CONCERNS:

- The budget is weighted heavily on land acquisition. If the partners are unable to complete the property transactions, it may limit the success of the Initiative.
- While a lab technician and monitoring staff will be hired as part of this Initiative, it is unclear if the partnership has the technical capacity to analyze and interpret the data needed to measure progress toward objectives.

ADDITIONAL COMMENTS:

None

1. **Name of Initiative:** Lake County All Lands Restoration Initiative

2. **Name of Partnership:** Klamath-Lake Forest Health Partnership

3. **Application Number:** 223-8218-20122

4. **Initiative addresses the following Board-identified Priority(ies):** Dry-type Forest Habitat

5. **Initiative Abstract (from the application)**
   The partnership envisions utilizing this funding to create a healthy, resilient, and functional forest landscape maintained with fire as an ecological process, while mitigating the threat of high severity wildfire to dry forests, fish and wildlife habitat, water quality, and the surrounding human communities. The ecological outcomes align with the Dry-Type Forest Habitat OWEB priority and include: developing a short- and long-term strategy for prescribed fire to re-establish the historical frequency of fire; engaging with private landowners to increase public knowledge of dry forest restoration principles and techniques; restoring dry forest landscape resiliency by re-establishing open and variable forest structure and reducing fuel loading; restoring healthy aspen, meadow, and shrub-steppe habitats by reducing encroaching conifers and juniper; and re-introducing prescribed fire as a key ecological process. These outcomes would be accomplished through strategic thinning, prescribed fire, and noxious weed treatments completed by the core partners including Klamath-Lake Forest Health Partnership (KLFHP), Lake County Umbrella Watershed Council (LCUWC), Fremont-Winema National Forest (USFS), Oregon Department of Forestry (ODF), Oregon State University (OSU Extension), Natural Resources Conservation Service (NRCS), Lake County Resources Initiative (LCRI), Oregon Department of Fish and Wildlife (ODFW), and the Lake County Cooperative Weed Management Area (Lake County CWMA).

6. **Budget Overview:**

Funding Period	OWEB Funding Request	Estimated Match
Biennium 1	$4,000,000	$5,260,642
Biennium 2	$4,000,000	$2,218,590
Biennium 3	$4,000,000	$2,175,170
Total	$12,000,000	$9,654,402

7. **Overall Initiative Rating:**
   (see attached evaluation criteria review worksheet for details)

Evaluation Criteria	Rating
A) Extent to which initiative addresses a board priority	N/A
B) Capacity to partner, engage the community, and catalyze additional investments	Medium
C) Performance history and composition of the partnership	Medium
D) Potential for progress toward measurable ecological outcomes	High (-)
E) Ability to track progress towards proposed outcomes	Medium (+)
F) Scientific basis and planning tools that support the proposed initiative	High

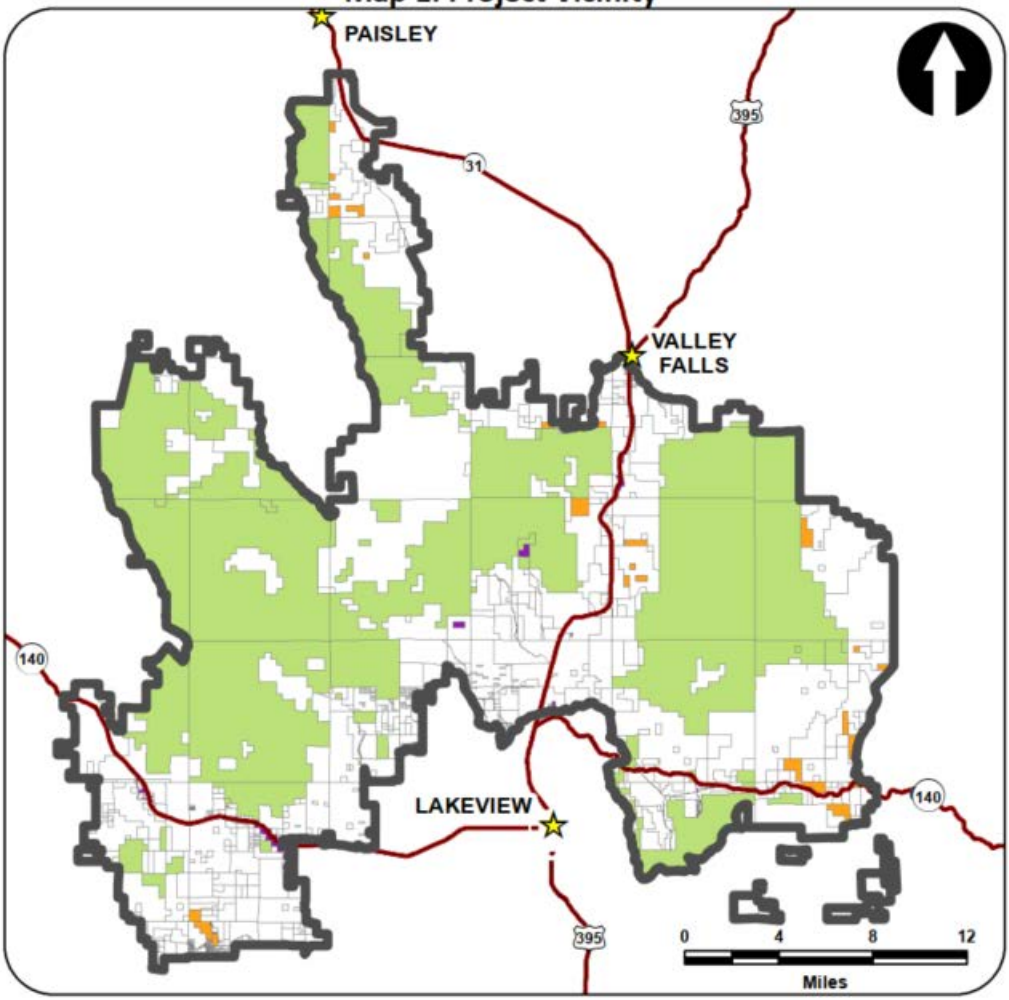
G) Budget supports achieving ecological outcomes	High (-)

8. Board Committee Ranking: 8

Attachment A: Initiative Map
Attachment B: Evaluation Criteria Ratings Worksheet

Lake County All Lands Restoration Initiative

Map 1: Project Vicinity



Lake County All Lands Restoration Initiative Boundary (LCALRI)

FIP Priority Review: Dry-type Forest Habitat

Name of Initiative: Lake County All Lands Restoration Initiative

Name of Partnership: Klamath-Lake Forest Health Partnership

EVALUATION CRITERIA

(a) The extent to which the initiative addresses a Board-identified priority.
Rating: This criterion will be evaluated through the OWEB Board Grants Committee

(b) The capacity to partner, engage the community, and catalyze additional investments applied to activities within the initiative geography.
Rating: Medium

STRENGTHS:

- The proposal clearly identifies partner roles and responsibilities that build on partner strengths.
- The proposal describes a well-defined subcommittee structure to support the capacity of the partnership.
- The partnership has a history of successfully leveraging funding to implement collaborative projects within the initiative's geography.

CONCERNS:

- While the proposal clearly describes challenges within the initiative geography related to private landowner engagement, it does not describe how the partners will address these challenges.
- The proposal does not demonstrate that the stakeholder engagement strategies proposed are the most appropriate strategies to achieve their desired ecological outcomes.
- The budget allocates a small amount of funding to stakeholder engagement in comparison to the described need.
- The stakeholder engagement strategies described in the proposal are one-way communication pathways and do not provide the opportunity for the partnership members to engage in deeper dialogue with stakeholders, which could limit the partnership's ability to achieve their proposed ecological outcomes in the long-term.

ADDITIONAL COMMENTS:

None

(c) The performance history and composition of the partnership.
Rating: Medium

STRENGTHS:

- The partnership has a history of working together to implement projects and has the

necessary agreements in place to work together and meaningfully share resources and responsibilities.
- The core partners have the knowledge and expertise to implement the proposed projects and the partners are working with the appropriate state, federal, and local government partners to implement prescribed fire.

CONCERNS:
- The partnership does not include The Nature Conservancy or the Klamath Tribes. Both organizations have experience with prescribed fire at the landscape scale and could help the partnership achieve its proposed long-term ecological outcome of returning prescribed fire to the landscape.
- The partnership has experience with implementing prescribed fire but does not describe lessons learned or how that experience will be used to implement prescribed fire at the landscape scale.
- The proposal describes limited engagement with the Klamath Tribes, whose input is important to achieve the proposed ecological outcomes.

ADDITIONAL COMMENTS:

None

(d) The extent to which the proposed approach will make progress toward measurable ecological outcomes.

Rating: High (-)

STRENGTHS:
- The proposal clearly describes the restoration strategies, conservation actions, and anticipated social, economic, and ecological outcomes.
- The partnership has experience utilizing an adaptive management framework through the North Warner Project. Those lessons learned will be applied to this FIP initiative.
- The proposal clearly describes the proposed actions, outcomes, metrics, and monitoring needs, and clearly outlines the ecological and social issues within the geography.
- Adding partner workforce through this funding will allow for important work to be accomplished in this geography.
- The proposal describes that professional foresters will provide recommendations for each stand.
- The partnership has a history of securing funding for a variety of grant types that has prepared them for this initiative, including a technical assistance grant that funded mapping and project identification and prioritization of potential treatments.

- The proposal identifies priority species and how the various treatment types would impact those species. This allows the partnership to determine the best actions to achieve ecological objectives.

CONCERNS:

- This initiative is time sensitive. If wildfires come through the proposed geography before treatment can be done, it will limit the success of the initiative.
- There is a significant liability associated with reintroducing fire in the landscape. The proposed project area is within the wildland/urban interface which creates concerns around liability and smoke management. While residents of the basin are accustomed to smoke, if a fire were to start in one of these areas, it would be difficult to stop before it reached homes.
- Contractor shortages in the geography have the potential to delay project implementation.
- The proposal includes actions on roughly 10,000 acres of shrub-steppe habitat. While there are marginal areas that have overlap between shrub-steppe and dry forest, this amount of acreage may not be appropriate for a dry type forest initiative.
- The proposal lacks tribal engagement and utilization of tribal traditional ecological knowledge. The proposal describes notifying the tribes but does not appear to have provided the tribes an opportunity for input.

ADDITIONAL COMMENTS:

None

(e) The ability to track progress towards proposed outcomes.

Rating: Medium (+)

STRENGTHS:

- The Lake County Resources Initiative has a long-standing monitoring program and will be the lead on implementing the monitoring plan.
- The partnership recently developed an Arc GIS online platform and it will be updated to track monitoring data for this FIP initiative.
- The partnership provided a link to examples of past monitoring reports that were completed following a similar monitoring approach in this geographic area. The reports are well written and demonstrate their ability to collect, manage, analyze, and interpret the data.
- A key protocol to be followed, Fire Effects Monitoring and Inventory Protocol (FIREMON) is likely to provide adequate baseline and post treatment data on key ecosystem attributes that will enable them to track their progress toward meeting ecological outcomes over time.

- The partnership has completed fire risk monitoring and developed specific goals for reduction.

CONCERNS:

- The monitoring plan lacks detail on the ecological outcomes and metrics that they plan to monitor.
- The proposal oversimplifies how the data will be managed and lacks detail on data management.
- The proposal does not describe how the data will be analyzed or interpreted.
- The proposal describes the desire to show resilience to fire but does not include specific fire resilience goals.
- The proposal would benefit from further description of the initiative's plan for adaptive management.

ADDITIONAL COMMENTS:

None

(f) The scientific basis and planning tools that support the proposed Initiative.
Rating: High

STRENGTHS:

- The proposal includes ample data to understand baseline conditions.
- There is a well-cited, scientific basis on why thinning and prescribed burning work, and the proposal references the literature that the partnership used to guide their approach.
- The proposal describes the lessons that the partnership has learned from prescribed fire and how they are applying those lessons for future treatment.
- The proposal references the climate change vulnerability assessment to bring a scientific basis to their planning.
- The proposal explicitly identifies the Oregon Conservation Strategy and how this initiative could overlap with those goals and actions.

CONCERNS:

- While the proposal provides a link to past monitoring reports to understand how monitoring data was analyzed in the past, it is not clear that the same process will be followed moving forward in this initiative.

ADDITIONAL COMMENTS:

None

(g) The extent to which the allocation of funds across proposed grant types will support the achievement of the proposed ecological outcomes.
Rating: High (-)

STRENGTHS:

- The proposal allocates funds to appropriate partners.
- The proposed budget appears to be carefully developed and provides detail that makes it easy to understand.
- The partnership has already leveraged outside funding to work on planning and landowner engagement.

CONCERNS:

- If a wildfire goes through the geography prior to treatment, the priorities of the partnership will likely be impacted and the success of the initiative may be limited.
- It is unclear why the request for monitoring funds is reduced in the second biennium and whether this reduction is appropriate.
- The stakeholder engagement budget is low for the level of engagement necessary to implement the initiative.

ADDITIONAL COMMENTS:

None

1. **Name of Initiative:** Coos Basin Coho Strategic Action Plan Implementation

2. **Name of Partnership:** Coos Basin Coho Partnership

3. **Application Number:** 223-8220-20124

4. **Initiative addresses the following Board-identified Priority(ies):** Coho Habitats and Populations along the Oregon Coast

5. **Initiative Abstract (from the application)**
   The Coos Basin Partnership (CBP) team includes: Coos Watershed, Confederated Tribes of the Coos, Lower Umpqua and Siuslaw Indians, Coquille Indian Tribe, Coos Soil and Water Conservation District, Curry Soil and Water Conservation District – Conservation Reserve Enhancement Program, Weyerhaeuser, Wild Rivers Land Trust, Wild Salmon Center, Oregon Department of Fish and Wildlife, Oregon Department of Environmental Quality, Bureau of Land Management – Coos Bay District, National Oceanic and Atmospheric Administration – Restoration Center, Natural Resource Conservation Service, South Slough National Estuarine Research Reserve, United State Fish and Wildlife Service – Coastal Program.

   CBP will utilize OWEB funds from 7/2022 - 6/2028 to implement the high priority actions within the Coos Basin Coho Strategic Action Plan. The following primary ecological objectives that this application address will make quantifiable progress towards OWEB's board priority for Coho Habitat and Populations along the Oregon Coast: increased juvenile coho production, increase in functional juvenile and adult Coho migratory connectivity, improved mainstem water quality, increased mainstem habitat complexity, increased tributary habitat complexity, increase in high quality estuarine habitat (fresh or salt), increase in juvenile coho overwinter survival, and increase in adult coho spawner abundance.

6. **Budget Overview:**

Funding Period	OWEB Funding Request	Estimated Match
Biennium 1	$3,469,614	$2,923,290
Biennium 2	$3,858,971	$3,086,336
Biennium 3	$3,747,408	$1,886,552
Total	$11,075,993	$7,896,178

7. **Overall Initiative Rating:**
   (see attached evaluation criteria review worksheet for details)

Evaluation Criteria	Rating
A) Extent to which initiative addresses a board priority	N/A
B) Capacity to partner, engage the community, and catalyze additional investments	High
C) Performance history and composition of the partnership	High
D) Potential for progress toward measurable ecological outcomes	High (-)

E) Ability to track progress towards proposed outcomes	Medium (+)
F) Scientific basis and planning tools that support the proposed initiative	Medium
G) Budget supports achieving ecological outcomes	High (-)

8. **Board Committee Ranking:** 5

Attachment A: Initiative Map
Attachment B: Evaluation Criteria Ratings Worksheet

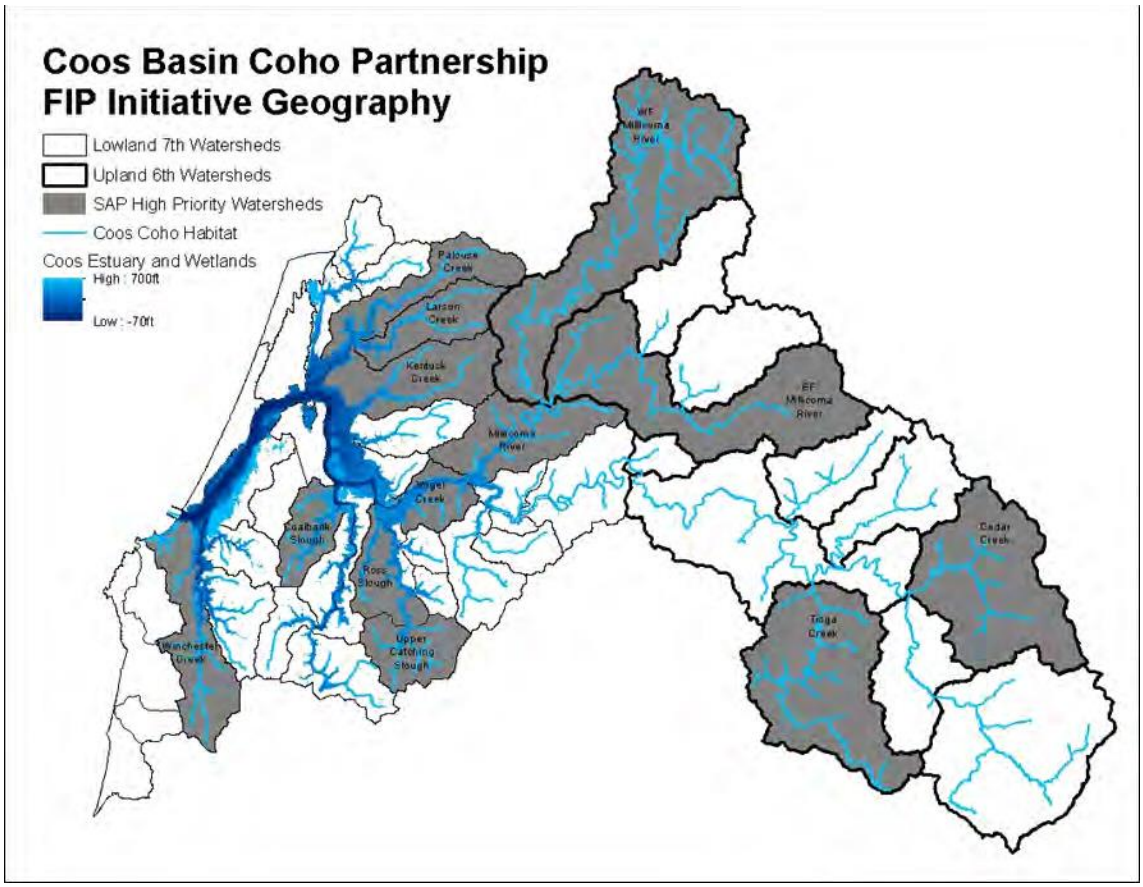


Figure 8.1 Coos Basin Coho Partnership FIP Initiative Geography. Gray 6th field upland and 7th field lowland subbasins indicate High Priority subwatersheds identified in the SAP and selected as the focus areas for the CBP FIP Initiative. White sub-watersheds were identified in the SAP as excluded or lower priority and are not included in the FIP geography.

FIP Priority Review: Coho Habitats and Populations along the Oregon Coast

Name of Initiative: Coos Basin Coho Strategic Action Plan Implementation

Name of Partnership: Coos Basin Coho Partnership

EVALUATION CRITERIA

(a) The extent to which the initiative addresses a Board-identified priority.
Rating: This criterion will be evaluated through the OWEB Board Grants Committee

(b) The capacity to partner, engage the community, and catalyze additional investments applied to activities within the initiative geography.
Rating: High

STRENGTHS:

- The proposal demonstrates that the partners have made long-term commitments to each other and have the capacity to implement the proposed FIP initiative.
- The roles and responsibilities of the partners are clearly described in the proposal, including the match resources each group brings to the FIP initiative.
- The proposal includes a clear plan for community engagement, including hiring a contractor to develop new outreach tools.
- The partners are engaged with other local projects, including the tide gate partnership.
- The majority of the projects proposed in the workplan already have landowner agreements in place.

CONCERNS:

- This is a larger partnership with decision-making based on the consensus of a quorum, which may be challenging at times.

ADDITIONAL COMMENTS:

None

(c) The performance history and composition of the partnership
Rating: High

STRENGTHS:

- The partnership has collaborated informally for more than 25 years. In 2018, the partnership formalized in coordination with the Wild Salmon Center and NOAA through the completion of a Coho Business Plan and the adoption of a formal decision-making process.
- The composition of the partnership is diverse, including engagement with the local tribes, and is the right collection of partners to achieve the proposed ecological outcomes. The proposal also provides a thoughtful description of which local entities are not involved in the FIP initiative and why they are not involved.

CONCERNS:

- The proposal includes a diverse set of partners, yet the work plan included in the proposal for all three biennia show that most of the work will be done by the Coos Watershed Association. This is understandable since the Coos Watershed Association is the primary implementor in the basin and has the most expertise in project implementation; however, spreading implementation funds among partners could improve long-term partnership effectiveness.

ADDITIONAL COMMENTS:

None

(d) The extent to which the proposed approach will make progress toward measurable ecological outcomes.

Rating: High (-)

STRENGTHS:

- The proposal includes an extensive strategic action plan (SAP) that builds on two previous plans and provides a clear path to prioritized actions.
- The proposal includes a detailed work plan describing 40 projects through the life of the initiative. Additionally, the proposal includes a one-page summary for each of the 15 projects proposed in biennium one.
- The proposal includes a well-thought-out outreach plan that describes landowner recruitment as the biggest limiting factor to partnership success; however, most projects have established landowner relationships, and the partners have good experience and success in recruiting landowners for restoration actions.
- The proposal describes a dual approach with both interior areas and tidal areas targeted for restoration. This adds some resiliency to the initiative, as funding and projects are spread to different habitat types.
- The tidally influenced restoration in this proposal is cutting edge with well-supported literature.
- The partners have been heavily involved in the Tide Gate Partnership and are on the leading edge of tide gate upgrade projects with management plans that can benefit both landowners and habitat.
- The proposal clearly demonstrates that partners are bought into the partnership, including two Tribes, and have a strong foundation of success.

CONCERNS:

- The proposal would benefit from additional discussion on why beaver reintroduction is necessary and how it would achieve desired outcomes.
- While these partners are some of the most experienced tide gate practitioners in Oregon, there are uncertainties associated with tide gate work and permitting that could present challenges.

ADDITIONAL COMMENTS:

None

(e) The ability to track progress towards proposed outcomes.

Rating: Medium (+)

STRENGTHS:

- The partnership has an established monitoring team that will fully scope and design a monitoring plan over the 6-year initiative. The proposal states that monitoring analysis will be incorporated into adaptive management.
- The proposal cites multiple data sets that each partnership possesses and the value that is provided to prioritize their geographic area of interest.
- The proposal cites state and federal plans that provide a roadmap for conservation and recovery goals in the Coos Basin. These plans guide the assessment of current conditions and the expected changes as restoration strategies are implemented.
- There is ample juvenile and adult Coho data in multiple subwatersheds in the Coos Basin that can be compared over time as conservation actions are implemented.
- The partnership has extensive baseline data in addition to tribal traditional ecological knowledge. The proposed monitoring metrics to measure ecological outcomes are easily measured through surveys.
- Oregon Department of Fish and Wildlife (ODFW) habitat quality data exists across every subbasin with Coho present. This data can be compared to post-restoration data.
- The Theory of Change succinctly describes how conservation actions will address limiting factors and lead to desired ecological outcomes.
- The proposal does a good job of linking proposed actions to Coho survival and production metrics as opposed to miles or acres of restored habitat.

CONCERNS:

- Measuring outcomes in a statistically significant manner to show meaningful progress will take monitoring and analysis well beyond the timeline of this initiative. The partnership should plan for many years of monitoring to get to the outcomes described in the proposal.
- While the proposal includes population-level monitoring, it would benefit from also measuring progress at the project level.
- The Theory of Change does not describe the role of land acquisition and conservation easement actions.
- While the work plan clearly describes the monitoring to be performed, including the scale of monitoring and metrics, there is an inconsistency in the information provided in the proposal. The proposal would benefit from a more detailed, consistent, description of monitoring.

ADDITIONAL COMMENTS:

None

(f) The scientific basis and planning tools that support the proposed Initiative.
Rating: Medium

STRENGTHS:

- The proposal is well-thought-out with a focus to develop and reconnect anchor habitat for Coho.
- The partners understand the benefits of beaver and beaver dam analogs—they intend to incorporate beaver reintroduction into the initiative activities.
- The proposal demonstrates the partnership's knowledge of the benefits of old-growth forests to aquatic habitat.
- The proposal clearly incorporates climate change projections, particularly in tidal areas, and describes the context for Coho decline and climate impacts, including key scientific reference documents. Partners have developed a climate resiliency mapping tool.

CONCERNS:

- While the prioritization of projects is well-described in the SAP, the proposal narrative would benefit from additional details of project prioritization.
- Some of the referenced planning documents that relate to climate change are outdated.

ADDITIONAL COMMENTS:

None

(g) The extent to which the allocation of funds across proposed grant types will support the achievement of the proposed ecological outcomes.
Rating: High (-)

STRENGTHS:

- The extensive monitoring budget seems appropriate for the scale of monitoring proposed in this initiative and will provide data needed to perform adaptive management.
- There is a good variety of matching funds including contributions from private industrial forest and non-profit organizations.
- The work plan's focus on restoration projects is appropriate for the initiative.
- The stakeholder engagement budget is appropriate given that many landowners are already engaged and committed to projects.

CONCERNS:

- Although the work plan provides a breakdown of the budget for each project, the proposal budget lists two restoration partners and does not break down how restoration funding and match are divided. The proposal would benefit from further description of the allocation of restoration funding between these partners.

ADDITIONAL COMMENTS:

None

1. **Name of Initiative:** Hood River Basin Aquatic Habitat Restoration Initiative

2. **Name of Partnership:** Hood River Basin Partnership

3. **Application Number:** 223-8226-20130

4. **Initiative addresses the following Board-identified Priority(ies):** Aquatic Habitat for Native Fish Species

5. **Initiative Abstract (from the application)**

The Hood River Basin Partnership has eight core partners participating in this proposal, including the Hood River Watershed Group, Hood River Soil & Water Conservation District, Confederated Tribes of the Warm Springs, East Fork Irrigation District, Farmers Irrigation District, Middle Fork Irrigation District, USFS Hood River Ranger District, and the Oregon Department of Fish & Wildlife. Key ecological outcomes include increased quantity and quality of spawning and rearing habitat for native fish species and protection of water quality. FIP funding would provide costshare on the highest priority water conservation, aquatic habitat, and fish passage projects, along with landowner engagement, technical assistance, and monitoring to support these projects and ecological outcomes. The scope of work is consistent with OWEB's 'Aquatic Habitat for Native Fish Species' FIP priority for several reasons: 1) The Hood River Watershed is a high priority focal area; 2) The projects/actions in this proposal address limiting factors identified in the Lower Columbia Conservation and Recovery Plan for Oregon Populations of Salmon and Steelhead (2010); and 3) Collectively, the proposed actions will restore and protect watershed processes that lead to improved aquatic habitat for Chinook salmon, steelhead, coho, bull trout, Pacific lamprey, and other native fish species.

6. **Budget Overview:**

Funding Period	OWEB Funding Request	Estimated Match
Biennium 1	$2,103,000	$7,537,000
Biennium 2	$2,243,000	$12,503,370
Biennium 3	$2,168,000	$5,878,370
Total	**$6,514,000**	**$25,918,740**

7. **Overall Initiative Rating:**
(see attached evaluation criteria review worksheet for details)

Evaluation Criteria	Rating
A) Extent to which initiative addresses a board priority	N/A
B) Capacity to partner, engage the community, and catalyze additional investments	High
C) Performance history and composition of the partnership	High (-)
D) Potential for progress toward measurable ecological outcomes	Medium (+)
E) Ability to track progress towards proposed outcomes	Medium
F) Scientific basis and planning tools that support the proposed initiative	High (-)
G) Budget supports achieving ecological outcomes	Medium (+)

8. **Board Committee Ranking:** 7

Attachment A: Initiative Map
Attachment B: Evaluation Criteria Ratings Worksheet

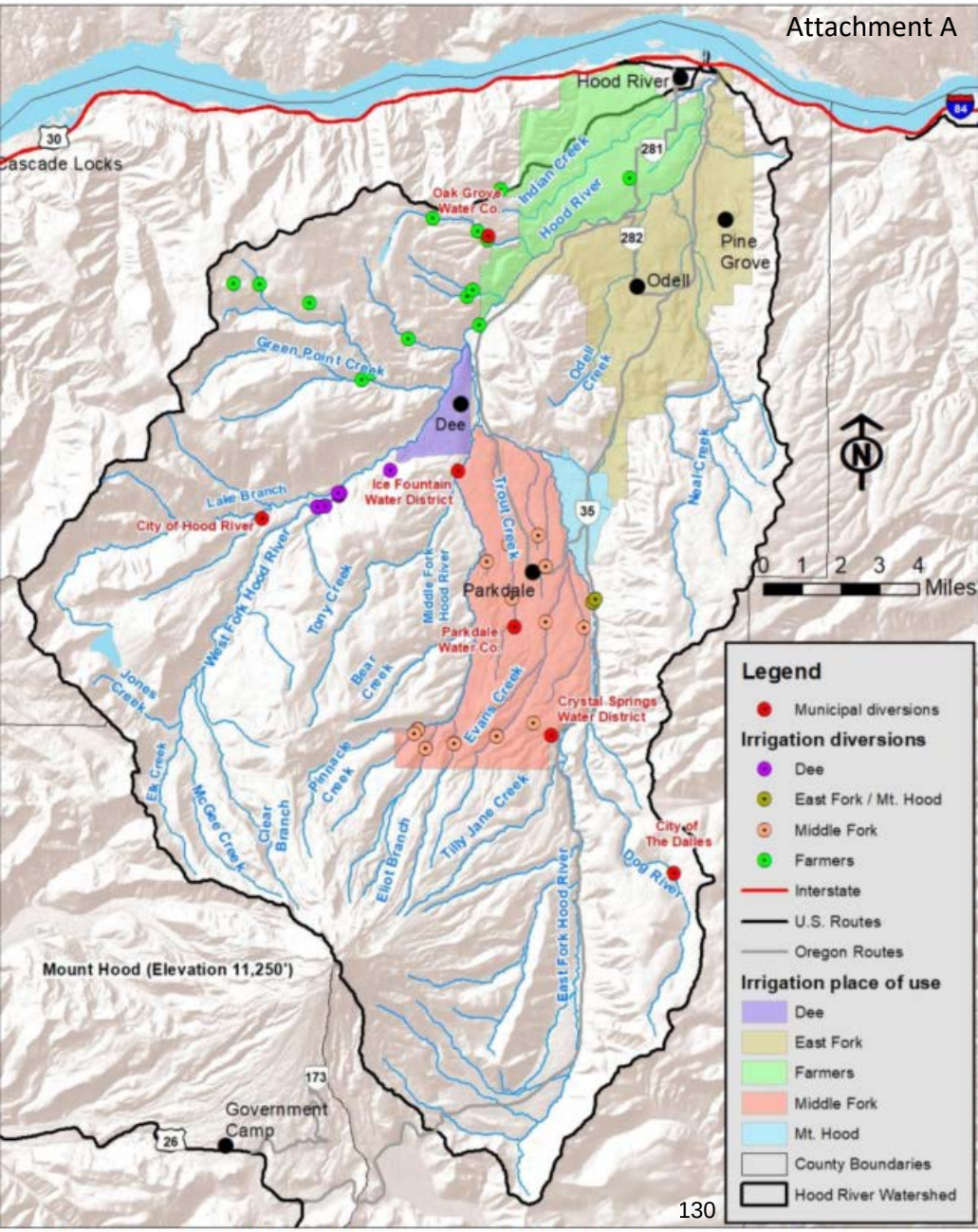


Figure 1. Principal points of diversion for municipal and irrigation water districts, and irrigation district boundaries. **This map also shows the FIP geography, which coincides with the watershed boundary.**

FIP Priority Review: Aquatic Habitat for Native Fish Species

Name of Initiative: Hood River Basin Aquatic Habitat Restoration Initiative

Name of Partnership: Hood River Basin Partnership

EVALUATION CRITERIA

(a) The extent to which the initiative addresses a Board-identified priority.
Rating: This criterion will be evaluated through the OWEB Board Grants Committee

(b) The capacity to partner, engage the community, and catalyze additional investments applied to activities within the initiative geography.
Rating: High

STRENGTHS:

- The roles and responsibilities of the partners are clearly described in the proposal and make sense given the strengths of each partner.
- The proposal demonstrates that the partnership has leveraged additional funding to support the ecological outcomes.
- The governance structure is developed to account for future staffing transitions, which support the partnership's ability for long-term success.
- The partnership includes local, state, federal, tribal, and irrigation district partners which have the right expertise to achieve the proposed ecological outcomes.

CONCERNS:

- There is a significant Spanish-speaking population within the proposed FIP geography, but no formal plan to engage this population is included in the proposal.

ADDITIONAL COMMENTS/QUESTIONS:

None

(c) The performance history and composition of the partnership.
Rating: High (-)

STRENGTHS:

- The composition of the partnership, including the participation of the Confederated Tribes of the Warm Springs and Oregon Department of Fish and Wildlife (ODFW) as core partners, supports the proposed ecological outcomes.
- The individual members of the partnership have worked together to plan and implement restoration actions for many years— this proposal builds off their collective success.
- The irrigation district members of this partnership have been leaders in irrigation modernization efforts.

CONCERNS:

- It is clear from the proposal that the partners have worked together for a long-time, but reviewers found the description of the partnership and its decision-making process to be vague. A more detailed description would have helped the reviewers understand how the partnership would operate if awarded a FIP.

ADDITIONAL COMMENTS/QUESTIONS:

None

(d) The extent to which the proposed approach will make progress toward measurable ecological outcomes.

Rating: Medium (+)

STRENGTHS:

- The partnership includes estimated outputs in terms of miles, acres, water conserved, etc., and clearly links them to ecological outcomes.
- The proposal does a good job relating specific actions and areas where the partners work in priority areas for multiple fish species.
- Reliance on beaver dam analogs to achieve channel restoration work is risky but could result in immediate benefits with sufficient sediment load given the glacial headwaters of the watershed.
- Water conserved via irrigation efficiency projects will be returned to instream via OWRD's conserved water program.

CONCERNS:

- The initiative's geography encompasses the entire watershed.
- The initiative includes an ambitious irrigation efficiency goal. It's not clear from the proposal whether it's achievable unless there is an accompanying increase in landowner participation in USDA Farm Bill programs.
- Some of the restoration activities (livestock fencing, riparian, manure management, etc.) described in the proposal are modest in scope.
- For irrigation efficiency projects, the proposal could have provided a better description of how conserved water will be managed. Information is found in the Strategic Action Plan (SAP), but not in the narrative response to the questions.
- With the watershed's large number of orchards, it might be a concern to build beaver dam analogs in some identified locations because these will attract beaver and cause damage to valuable pear and cherry trees.

ADDITIONAL COMMENTS:

- Due to the watershed's snow and glacier-fed cold-water streams, and geographic location that encompasses habitat for species on both the west and east sides of the Cascades, the Hood River Watershed has a diverse assemblage of anadromous and resident fish. These include: spring and fall Chinook salmon, summer and winter steelhead, coho, Pacific lamprey, bull trout, searun and resident cutthroat trout, and rainbow trout.

- Currently, the Hood River basin provides cool water thermal refugia for aquatic species. The proposal describes how this is expected to change as glaciers recede due to warming temperatures caused by climate change.
- The partners have a history of successfully implementing projects awarded funding through OWEB's Open Solicitation grant program.

(e) The ability to track progress towards proposed outcomes.
Rating: Medium

STRENGTHS:

- The partnership has access to and relationships with partners who collect habitat, biological, and water quality data that describe existing conditions. The Hood River Basin Study provides a baseline of current irrigation and municipal water use and can be compared to future streamflows following implementation of restoration actions. Fish monitoring data is collected by Oregon Department of Fish and Wildlife and Confederated Tribes of Warm Springs.
- The proposal thoroughly describes known limiting factors in the basin.
- The proposed monitoring framework is a good start, and it will be even stronger once the monitoring plan is completed. The proposal demonstrates they are on the right trajectory.
- The partnership plans to convene the Technical Advisory Committee annually to review monitoring data and emerging research for stream habitat enhancement projects and identify alternative implementation strategies, if needed.

CONCERNS:

- Some of the metric measurements described in the proposal are not well-connected to outcomes (e.g., number of manure management projects doesn't equate to achieving outcomes)
- Improved water quality and management of nutrients are goals for the partnership, but the application is unclear how these ecological outcomes will be measured.
- There is no monitoring described to track progress associated with fish passage restoration or community engagement efforts.
- The proposal contains conflicting information needed to understand exactly what monitoring will be done and what metrics will be calculated to track progress for each restoration strategy.
- The proposal does not describe how the initiative's implementation data or monitoring data will be managed, analyzed and interpreted.

ADDITIONAL COMMENTS:

None

(f) The scientific basis and planning tools that support the proposed Initiative.
Rating: High (-)

STRENGTHS:

- The partnership is using an advisory committee to rank projects, with a mix of quantitative and qualitative criteria.
- The proposal provides good detail on how activities are prioritized using intrinsic potential for fish habitat, Bonneville Power Administration's Atlas model, along with integration of hydrologic conditions.
- The initiative's proposed actions align with the restoration targets identified for the Hood River basin in Oregon Department of Fish and Wildlife's (ODFW) Lower Columbia River Conservation and Recovery Plan for Salmon and Steelhead Recovery Plan.
- The partners are working from a fourth iteration of their SAP, which demonstrates commitment to process, as well as the partnership's successful implementation of projects that then necessitates updating the SAP as restoration targets are met.
- The proposed methodology to measure and track flow and expected outcomes on flow restoration are well described.
- The proposal incorporates climate change data and potential future water scenarios into flow restoration planning and prioritization.

CONCERNS:

- The proposal briefly describes that proposed flow restoration actions may lead to higher streamflows and velocities in some locations than are optimal for some salmonid species.

ADDITIONAL COMMENTS:

None

(g) The extent to which the allocation of funds across proposed grant types will support the achievement of the proposed ecological outcomes.

Rating: Medium (+)

STRENGTHS:

- The initiative's ecological goals are focused on habitat and flow, and the budget reflects this well.
- A significant portion of the initiative's monitoring funding is match provided by the Confederated Tribes of Warm Springs.
- The proposal includes diverse sources of match funding.

CONCERNS:

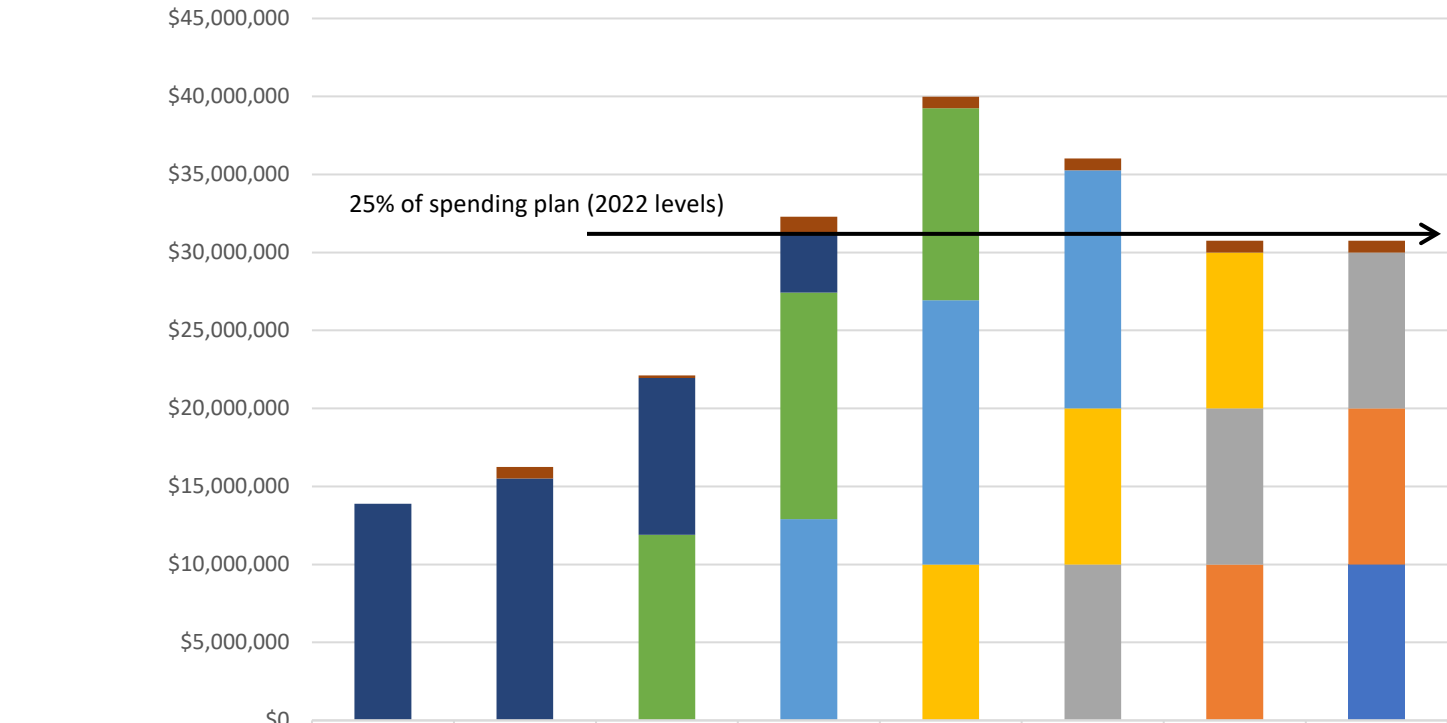
- The budget for stakeholder engagement is low with only $95,000 budgeted in total for all six years of the initiative.
- The budget for Partnership Technical Assistance is low and the proposal does not explain why partners would not request funding to support partnership coordination, communication, meeting facilitation, reporting, training, etc.

ADDITIONAL COMMENTS:

- The monitoring budget is much higher in the first biennia then in later biennia. Since the partners are developing a monitoring plan in the first biennia, this may not be a concern.
- Promoting pesticide stewardship is noted in application but is not reflected in the budget.

Name of Partnership	Initiative	Proposal #	FIP Priority	Biennium 1 Request	Cumulative Biennium 1 Request	Biennium 2 Request	Cumulative Biennium 2 Request	Biennium 3 Request	Cumulative Biennium 3 Request	Total Request	Overall Rating	Committee Ranking
Klamath Siskiyou Oak Network	Little Butte Oak Initiative	223-8217	Oak Woodland and Prairie Habitat	$1,373,266	$1,373,266	$2,714,735	$2,714,735	$2,959,837	$2,959,837	$7,047,838	High (-)	1
East Cascades Oak Partnership	Oak and Fire: Restoring Resilience in the East Cascades	223-8221	Oak Woodland and Prairie Habitat	$2,544,000	$3,917,266	$2,433,000	$5,147,735	$2,177,000	$5,136,837	$7,154,000	High (-)	2
Siuslaw Coho Partnership	Habitat Restoration for Oregon Coast Coho Recovery in the Siuslaw River and Coastal Lakes Basins	223-8222	Coho Habitat and Populations along the Coast	$4,000,000	$7,917,266	$4,000,000	$9,147,735	$4,000,000	$9,136,837	$12,000,000	High (-)	3
Oregon Central Coast Estuary Collabor-ative	Restoring Resilience in Two Estuaries	223-8223	Coastal Estuaries in Oregon	$1,523,000	$9,440,266	$3,921,700	$13,069,435	$2,390,250	$11,527,087	$7,834,950	High (-)	3
Coos Basin Coho Partnership	Coos Basin Coho Strategic Action Plan Implementa-tion	223-8220	Coho Habitat and Populations along the Coast	$3,469,614	$12,909,880	$3,858,971	$16,928,406	$3,747,408	$15,274,495	$11,075,993	High (-)	5

Harney Basin Wetlands Collabor-ative	Improving Aquatic Health in the Harney Basin	223-8219	Closed Lakes Basin Wetland Habitat	$3,923,080	$16,832,960	$3,856,280	$20,784,686	$3,972,180	$19,246,675	$11,751,540	Medium (+)	6
Hood River Basin Partnership	Hood River Basin Aquatic Habitat Restoration Initiative	223-8206	Aquatic Habitat for Native Fish Species	$2,103,000	$18,935,960	$2,243,000	$23,027,686	$2,168,000	$21,414,675	$6,514,000	High (-)	7
Klamath Lake Forest Health Partnership	Lake County All Lands Restoration Initiative	223-8218	Dry-Type Forest Habitat	$4,000,000	$22,935,960	$4,000,000	$27,027,686	$4,000,000	$25,414,675	$12,000,000	Medium (+)	8
Oregon All Counties CCAA Steering Committee	Oregon Model to Project Sage Grouse, All Counties Phase II	223-8224	Sagebrush/ Sage-steppe	$4,000,000	$26,935,960	$4,000,000	$31,027,686	$4,000,000	$29,414,675	$12,000,000	Medium (+)	9
Salmon Super-highway Partnership	Salmon SuperHwy Native Fish Habitat Reconnection	223-8225	Aquatic Habitat for Native Fish Species	$3,000,000	$29,935,960	$3,153,000	$34,180,686	$3,153,000	$32,567,675	$9,306,000	Medium (+)	10
Tenmile Lakes Steering Committee	Tenmile Lakes Native Fisheries and Water Quality Restoration Plan	223-8216	Coho Habitat and Populations along the Coast	$743,421	$30,679,381	$1,149,490	$35,330,176	$1,736,620	$34,304,295	$3,629,531	Medium	11
			Total	**$30,679,381**		**$35,330,176**		**$34,304,295**		**$100,313,852**		



	2015-17	2017-19	2019-21	2021-23	2023-25	2025-27	2027-29	2029-31
FI Effectiveness Monitoring		$750,000	$150,000	$1,000,000	$750,000	$750,000	$750,000	$750,000
FIP 2015	$13,895,970	$15,506,750	$10,050,093	$3,880,907				
FIP 2019			$11,908,015	$14,510,355	$12,313,620			
FIP 2021				$12,909,880	$16,928,406	$15,274,495		
FIP 2023					$10,000,000	$10,000,000	$10,000,000	
FIP 2025						$10,000,000	$10,000,000	$10,000,000
FIP 2027							$10,000,000	$10,000,000
FIP 2029								$10,000,000

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Agenda Item F supports all strategic plan priorities.

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Lisa Charpilloz Hanson, Executive Director

SUBJECT: Agenda Item F – Spending Plan Rebalance
July 26-27, 2022, Board Meeting

I. Introduction

At the July 2022 board meeting, staff will seek approval to add funds to the 2021-2023 board spending plan. The additions to the spending plan include funds held in reserve, recaptured grant funds, and Federal Fiscal Year (FFY) 2022 Pacific Coastal Salmon Recovery Funds (PCSRF).

II. Background

After the Oregon Legislature approves OWEB's budget each biennium, the board considers and approves a spending plan for the distribution of grant funding. The board spending plan guides the agency's grant investments for the biennium. Available funding for the board to distribute includes Measure 76 Lottery, federal, and salmon license plate revenues, with the bulk from Measure 76 and federal PCSRF.

At its July 2021 meeting, the board adopted the 2021-2023 spending plan totaling $124.918 million. The board amended the spending plan at its January and April 2022 meetings to reflect additional legislatively allocated funds to OWEB for drought and post-wildfire recovery grant programs, the Oregon Agricultural Heritage Program (OAHP) and water acquisitions grant program. These new funds were allocated from the State's general fund.

Page 9 of the Board eBook shows the approved spending plan, including recommendations for additional PCSRF funding if those funds became available. The board's approval was specific only to the funds available at the time.

III. Reserved and Recaptured Grant Funds

In developing the 2021-2023 spending plan, the board approved holding some funds in reserve as a buffer for unforeseen circumstances. These reserve funds totaled $2.739 million in lottery funds.

OWEB regularly recaptures funds that have been either returned because a project came in under budget or returned if a project was canceled. As of May 2022, recaptured grant funds totaled $5.923 million in lottery and PCSRF funds combined.

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IV. Pacific Coastal Salmon Recovery Funding

Since 2000, approximately one-third of OWEB's funding (both for grants and operations) has been provided through the competitive PCSRF grant process, which is offered by National Oceanic and Atmospheric Administration (NOAA) Fisheries. PCSRF has contributed just over $200 million to Oregon for salmon and steelhead recovery efforts.

The board and the state's Legislature have used PCSRF funding to support watershed restoration related actions and for staffing in state agencies. OWEB distributes PCSRF funds to the Oregon Department of Fish and Wildlife (ODFW) through an interagency agreement, and through OWEB's competitive grant programs. PCSRF has significantly enhanced OWEB's expenditures through grants in salmon and steelhead recovery areas around the state.

On an annual basis, OWEB, as the designated grant recipient for the State of Oregon, applies for PCSRF funding. The PCSRF solicitation includes a two-step application process. OWEB, on behalf of the State of Oregon, requested $25 million, the maximum amount of funding possible. This request included a required 33% match, which in the past has come from lottery funding, salmon license plate revenues, match from ODFW, along with additional leverage contributions.

NOAA notified Oregon that the award for FFY 22 will be $14.2 million in PCSRF dollars and $4.5 million in Infrastructure Investment and Jobs Act (IIJA) dollars; for a total of $18.7 million. Of that amount, $7 million is available for grants in the 2021-23 spending plan, with the remainder invested in support of OWEB staff costs, distributed to ODFW, or held in reserve for future biennia spending plans.

Funds Available to add to Fiscal Year 2023 Spending Plan:

Fund Source	Funds Available
Lottery Funds in reserve	$2.739 million
Recapture/unspent (Lottery & PCSRF)	$5.923 million
PCSRF new funds	$7.000 million
Total	**$15.662 million**

V. Proposed Changes to Spending Plan

Staff reviewed the existing spending plan and total funds available ($15.662 million) and identified line items where additional funds could support unmet funding needs in OWEB's existing grant offerings and address strategic plan priorities. Additions are proposed in Open Solicitation programs ($8.750 million), Focused Investment Partnerships ($3.250 million), and Operating Capacity ($2.325 million); for a total addition of $14.325 million. One line item,

Oregon Agricultural Heritage Program, was divided into two reflecting the Oregon Agricultural Heritage Commission's April 19, 2022, action dividing the $4.465 million available into $4.315 million for conservation easement grants and $150,000 for conservation management plan grants. As in the past, OWEB will hold funds in reserve in the amount of $1.337 million.

Additional funds allocated to grant programs for Fiscal Year 2023 Spending Plan:

Grant Program	Fund Allocation
Open Solicitation programs	$8.750 million
Focused Investment Partnerships	$3.250 million
Operating Capacity programs	$2.325 million
Held in reserve	$1.337 million
Total	**$15.662 million**

VI. Recommendation

Staff recommend that the board adopt the updated 2021-2023 Spending Plan.

VII. Attachments

A. 2021-2023 Spending Plan (duplicate to page 9 of July 2022 Board eBook)

2021- 2023 SPENDING PLAN FOR MEASURE 76 (LOTTERY), GENERAL FUNDS AND PCSRF FUNDS

July 2022 Board Meeting

	GRANTS	2021 Spending Plan as of April 2022	July 2022 additions	2022 Spending Plan	TOTAL Awards To-Date	July 2022 Proposed Board Awards	TOTAL Awards To-Date & Proposed Awards	Remaining Spending Plan after Awards To-Date	Other Funding Received & Delegated
1	**Open Solicitation:**								
2	Restoration	32.000	3.500	35.500	15.776		15.776	19.724	0.780
3	Technical Assistance								
4	Restoration TA	3.000	2.500	5.500	1.967		1.967	3.533	-
5	CREP TA	1.200		1.200	1.200		1.200	-	0.400
6	Stakeholder Engagement	2.250	0.500	2.750	0.773		0.773	1.977	-
7	Monitoring grants	4.250	0.500	4.750	1.837		1.837	2.913	-
8	Land and Water Acquisition	9.000	1.500	10.500	3.079		3.079	7.421	0.490
9	Weed Grants	3.250		3.250	3.250		3.250	-	-
10	Small Grants	2.800		2.800	2.800		2.800	-	-
11	Quantifying Outputs and Outcomes	1.000	0.250	1.250	0.150		0.150	1.100	-
12	**TOTAL**	**58.750**	**8.750**	**67.500**	**30.832**	**-**	**30.832**	**36.668**	**1.670**
13	**% of Total Core Programs**	**53.82%**		**54.66%**					
14	**% of OWEB Spending Plan total**	**37.96%**		**39.92%**					
15	**Focused Investments:**								
16	Deschutes	1.915		1.915	1.915		1.915	-	-
17	Willamette Mainstem Anchor Habitat	1.400		1.400	1.400		1.400	-	-
18	Harney Basin Wetlands	0.100		0.100	0.100		0.100	-	-
19	Upper Grande Ronde	0.466		0.466	0.466		0.466	-	-
20	John Day Partnership	4.000		4.000	4.000		4.000	-	-
21	Baker Sage Grouse	2.435		2.435	2.435		2.435	-	13.250
22	Warner Aquatic Habitat	2.293		2.293	2.293		2.293	-	-
23	Rogue Forest Rest. Ptnrshp	2.700		2.700	2.700		2.700	-	-
24	Clackamas Partnership	3.082		3.082	3.082		3.082	-	-
25	New FIP Solicitation	10.000	3.000	13.000	-	12.910	12.910	0.090	-
26	FI Effectiveness Monitoring	0.750	0.250	1.000	0.750		0.750	0.250	-
27	**TOTAL**	**29.141**	**3.250**	**32.391**	**19.141**	**12.910**	**32.051**	**0.340**	**13.250**
28	**% of Total Core Programs**	**26.69%**		**26.23%**					
29	**% of OWEB Spending Plan total**	**18.83%**		**19.16%**					
30	**Operating Capacity:**								
31	Capacity grants (WC/SWCD)	15.121	1.900	17.021	15.121		15.121	1.900	-
32	Statewide org partnership support	0.225	0.225	0.450	0.225		0.225	0.225	-
33	Organizational Collaboration	0.500	0.200	0.700	0.130	0.237	0.367	0.333	-
34	Partnership Technical Assistance	1.500		1.500	0.797		0.797	0.703	-
35	**TOTAL**	**17.346**	**2.325**	**19.671**	**16.273**	**0.237**	**16.510**	**3.1610**	**-**
36	**% of Total Core Programs**	**15.89%**		**15.93%**					
37	**% of OWEB Spending Plan total**	**11.21%**		**11.63%**					
38	**Other:**								
39	CREP	0.750		0.750	0.750		0.750	-	-
40	Governor's Priorities	1.000		1.000	0.877	0.070	0.947	0.053	0.147
41	Strategic Implementation Areas	1.500		1.500	1.500		1.500	-	-
42	Gov. directed - Lower Columbia Estuary Partnership	0.330		0.330	0.330		0.330	-	-
43	Gov. directed - Sage Grouse Conservation Partnership	0.350		0.350	0.350		0.350	-	-
44	**TOTAL**	**3.930**	**-**	**3.930**	**3.807**	**0.070**	**3.877**	**0.053**	**0.147**
45	**% of Total Core Programs**	**2.54%**		**2.32%**					
46	**% of OWEB Spending Plan total**	**2.54%**		**2.32%**					
47	**TOTAL Core Programs**	**109.167**	**14.325**	**123.492**	**70.053**	**13.217**	**83.270**	**40.222**	**15.067**
48	**General Fund:**								
49	2020 Fire Recovery & Restoration								
50	Riparian/upland rest. & water quality	10.750		10.750	10.750		10.750	-	-
51	Floodplain restoration & reconnection	5.000		5.000	5.000		5.000	-	-
52	2021 Fire Recovery & Restoration	5.000		5.000	5.000		5.000	-	-
53	2021 Drought Resiliency								
54	Irrigation District Grants	1.551		1.551	1.551		1.551	-	-
55	Irrigation District Grants - N Unit	1.906		1.906	1.906		1.906	-	-
56	Jefferson Co Resiliency Grants	0.852		0.852	0.852		0.852	-	-
57	Klamath Livestock Wells & off channel const grants	2.733		2.733	2.733		2.733	-	-
58	Klamath Co Resiliency Grants	0.731		0.731	0.731		0.731	-	-
59	Jefferson SWCD Soil Conservation Grants	3.000		3.000	3.000		3.000	-	-
60	Oregon Agricultural Heritage Program (OAHP)								
61	OAHP Conservation Easements*	4.315		4.315	-		-	4.315	-
62	OAHP Conservation Management Plans*	0.150		0.150	-		-	0.150	-
63	Water Acquisitions	9.596		9.596	-		-	9.596	-
64	**TOTAL**	**45.584**	**-**	**45.584**	**31.523**	**-**	**31.523**	**14.061**	**-**
65	**% of OWEB Spending Plan total**	**29.46%**		**26.96%**					
66	**TOTAL OWEB Spending Plan**	**154.751**	**14.325**	**169.076**	**101.576**	**13.217**	**114.793**	**54.283**	**15.067**
67	**Funds transferred from/to other agencies**								
68	Transfer to ODFW - PCSRF	12.884		12.884	12.884		12.884	-	-
69	Transfer to Eugene Water & Electric Board - GF	4.000		4.000	4.000		4.000	-	-
70	Transfer from ODF for Forest Health Collaboratives-OF	0.500		0.500			-	0.500	0.500
71	Transfer from PSMFC - IMW - OF	0.600		0.600			-	0.600	0.600
72	Transfer from NRCS - Farm Bill technical support - FF	-		-	-		-	-	-
73	**TOTAL**	**17.984**	**-**	**17.984**	**16.884**	**-**	**16.884**	**1.100**	**1.100**
74	**OWEB Spending Plan & Other Directed Funds**	**172.735**	**14.325**	**187.060**	**118.460**	**13.217**	**131.677**	**55.383**	**16.167**

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Agenda Item G supports OWEB's Strategic Plan priorities.

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Stephanie Page, Deputy Director
Eric Williams, Grant Program Manager
Eric Hartstein, Board and Legislative Policy Coordinator
Jessi Kershner, Water and Climate Programs Coordinator

SUBJECT: Agenda Item G – Climate Resolution Public Engagement Process Report
July 26-27, 2022, Board Meeting

I. Introduction

Staff will update the board on the climate resolution public engagement process, including providing an overview of engagement opportunities, participants, and key findings. Depending on the outcome of discussion, the board may consider whether to authorize associated rulemaking.

II. Background

In January 2022, the board passed Resolution 01-2022 ("Climate Resolution"), which commits OWEB to integrate climate mitigation and adaptation into funding and policy decisions through an inclusive and equitable process (Attachment A). Following the adoption of the Climate Resolution, OWEB staff led a public engagement process to gather feedback on how best to implement the resolution, including identifying potential challenges and opportunities as well as resources needed to help grant applicants integrate climate considerations into their projects.

III. Public Engagement Process

The public engagement process extended from mid-March to early June 2022, and included:

- A kick-off webinar with the Oregon Conservation Partnership in March;
- Six virtual listening sessions held in April and May;
- A tribal virtual listening session held in May;
- An online survey, open from mid-March to early June;
- Individual conversations with OWEB staff, as requested by partners; and
- Interviews with non-traditional partners (conducted by ECONorthwest).

In total, 77 unique participants attended the public listening sessions, with some of those participants attending multiple sessions. Sixteen representatives from eight tribes attended the tribal listening session, including the Burns Paiute Tribe; Confederated Tribes of Coos, Lower

Umpqua, and Siuslaw Indians; Confederated Tribes of Grand Ronde; Confederated Tribes of Siletz Indians; Confederated Tribes of the Umatilla Indian Reservation; Confederated Tribes of Warm Springs; Coquille Indian Tribe; and Cow Creek Band of Umpqua Tribe of Indians. A total of 44 online survey responses were received.

The public engagement process focused on the following four questions:

1. What opportunities and challenges do you see with building greenhouse gas emissions reductions, carbon sequestration and storage into your projects?
2. What opportunities and challenges do you see with building climate-smart adaptation and resilience into your projects?
3. What can OWEB do to help current and prospective grantees build climate considerations, such as impacts, adaptation, and mitigation, into their projects?
4. What's one important thing that OWEB needs to know as they think about rulemaking to include climate-focused evaluation criteria in grantmaking?

Key findings from the process were grouped according to rulemaking considerations, broader concerns and opportunities, and summary input on specific climate resolution bullet points. This information is found in the OWEB Climate Resolution Public Engagement Summary Report (Attachment B). All input received from the public engagement process is included in Attachment C.

Rulemaking considerations include:

- Develop broad evaluation criteria
- Maximize all project benefits
- Start qualitative and move to quantitative in grant applications and evaluation criteria
- Consider tradeoffs associated with mitigation-based criteria
- Re-examine potential project longevity and/or modify projects using a climate lens
- Flexibility is key
- Be clear about definitions and expectations of grant applicants
- Put traditionally underrepresented and impacted communities at the table with decision-making power
- Develop and apply a predetermined equity lens

Broader concerns and opportunities identified include:

- Restoration equipment transitions will be challenging
- Applicant capacity varies
- Be aware of unintended consequences
- Emissions reductions opportunities may be possible
- New funding opportunities could arise
- Best practices, case studies, and demonstration projects are effective tools to help applicants integrate climate-smart considerations into projects
- Invest time in developing long-term relationships

IV. Evaluation Criteria for Restoration Grants Rulemaking

Should the board desire incorporation of climate criteria into restoration grant rules, staff will convene a rules advisory committee (RAC) for Division 10 composed of grantees and other stakeholders in accordance with the draft schedule below.

Rulemaking Action	Dates/Deadlines
Board Authorization for Rulemaking	July 2022
Draft Rules Developed	September 2022
RAC Meetings to Vet Draft Rules and Provide Feedback	October 2022-January, 2023
Draft Rules Revised Based on RAC Feedback	February 1, 2023
Notice Filed with Secretary of State	February 15, 2023
Public Comment Materials posted online	March 1, 2023
Notice to Agency Mailing List and Legislators	March 1, 2023
Notice to Oregon's Tribes	March 1, 2023
Secretary of State's Bulletin	March 1, 2023 (published)
Public Comment Period	March 1-31, 2023
Public Hearing(s)	March, 2023
Revisions to Draft Rules Based on Public Comment	Early May, 2023
Board Adoption of Rules	July 25-26, 2023

V. Potential Action

After discussion of the input from the climate resolution public engagement process as presented in Attachments B and C to the staff report, the board may authorize rulemaking in OAR 695-010-0060 to develop climate-related evaluation criteria.

Attachments

A. Climate Resolution
B. Climate Resolution Public Engagement Process - Summary Report
C. Climate Resolution Public Engagement Process – All Input Received

Climate Resolution
OWEB Resolution 01-2022

Background

WHEREAS, Oregon's watersheds will continue to experience the impacts of significant climate changes, including but not limited to increased water temperatures, altered streamflows (e.g., decreased summer flows, earlier timing of flows), increased extreme events (e.g., drought, heat, flooding), and increased wildfires.

WHEREAS, these changes will affect fish and wildlife populations and may lead to changes in species distribution; reduced population sizes; decreased extent, availability, and quality of habitat; displacement of native species by invasive species, and other impacts.

WHEREAS, the impacts of climate change are affecting the quality and quantity of ground and surface water that is critical for Oregon's watersheds, natural resources, people, and communities.

WHEREAS, the impacts of a changing climate may disproportionately affect impacted communities, such as Native American tribes, communities of color, rural communities, coastal communities, lower-income households, and other communities traditionally underrepresented in public processes.

WHEREAS, investments in fish and wildlife habitat and watershed restoration and health can aid in mitigating for and adapting to the impacts of climate change on our state, by sequestering and storing carbon, maintaining and improving water quality and quantity, and building resiliency in fish and wildlife populations, ecosystems, and communities.

WHEREAS, restoration project components, including fuels, equipment, materials, and transportation, among others, will generate greenhouse gas emissions which may require acceptable tradeoffs in order to achieve the desired long-term net gains for communities and ecosystems.

WHEREAS, Oregon state agencies have been directed by Governor Brown (Executive Order 20-04) to address climate change in a comprehensive and urgent manner and, to the full extent allowed by law**,** shall consider and integrate climate change, climate change impacts, and the state's greenhouse gas emissions reduction goals into their planning, budgeting, investing, and policy making decisions.

Resolution

Be it resolved that the Oregon Watershed Enhancement Board will:

- Integrate climate mitigation and adaptation in their budgeting, investing and policy making decisions by:
    - Funding climate-smart adaptation and resilience for Oregon's watersheds, natural resources, people, and communities.

    - Funding projects that include meaningful emissions reductions, carbon sequestration, and protection of carbon storage in enhancing watershed health and habitat restoration.
    - Valuing project co-benefits and assessing long-term sustainability of projects and acquisitions.
- Learn and apply diversity, equity, inclusion, and environmental justice principles when making funding decisions to address challenges arising from climate change to traditionally underrepresented and impacted communities.
- Engage traditionally underrepresented and impacted communities in processes to craft meaningful solutions that are integrated into funding decisions.

It is further resolved that the above resolutions will be implemented through applicable strategies within OWEB's authorities. Strategies include but are not limited to:

- Rulemaking to include OWEB Climate Lens of climate-focused evaluation criteria
- Developing agency level goals and metrics for climate adaptation and mitigation to track progress
- Identifying opportunities for and collaborating with climate-focused partners and staff in other agencies to increase efficiencies and share expertise
- Supporting and assisting grantees and partners by providing funding for technical resources and guidance to improve understanding of climate considerations and criteria
- Supporting and funding continued learning and development of climate-smart strategies in watershed restoration and habitat improvement
- Employing a continuous improvement approach in the integration of climate considerations in the agency's grant programs

Definitions

Adaptation: the process of modifying and adjusting to a new or changing environment

Climate lens: project ranking criteria designed to determine the relative value of proposals according to how they address climate action

Climate-smart: the intentional consideration of climate change, and application of strategies that improve resilience, increase carbon sequestration, and/or reduce greenhouse gas emissions

Mitigation: a human intervention to reduce emissions or enhance greenhouse gas sequestration and storage

Resilience: the ability to prepare for, respond to, and recover from disruptions

OWEB CLIMATE RESOLUTION PUBLIC ENGAGEMENT PROCESS SUMMARY REPORT

July 2022

In January 2022, the OWEB Board passed Resolution 01-2022 ("Climate Resolution"), which commits OWEB to integrate climate mitigation and adaptation into funding and policy decisions through an inclusive and equitable process (Box 1). Following the adoption of the Climate Resolution, OWEB staff led a public engagement process to gather feedback on how best to implement the resolution, including identifying potential challenges and opportunities as well as resources needed to help applicants integrate climate considerations into their projects. The following report summarizes the public engagement process and organizes feedback into key findings related to rulemaking as well as broader concerns and opportunities and provides summary input on resolution bullet points related to mitigation; adaptation; diversity, equity, inclusion, and environmental justice principles; and engagement of traditionally underrepresented and impacted communities.

Box 1. Excerpt from Climate Resolution

Be it resolved that the Oregon Watershed Enhancement Board will:

- Integrate climate mitigation and adaptation in their budgeting, investing and policy making decisions by:
  - Funding climate-smart adaptation and resilience for Oregon's watersheds, natural resources, people, and communities.
  - Funding projects that include meaningful emissions reductions, carbon sequestration, and protection of carbon storage in enhancing watershed health and habitat restoration.
  - Valuing project co-benefits and assessing long-term sustainability of projects and acquisitions.
- Learn and apply diversity, equity, inclusion, and environmental justice principles when making funding decisions to address challenges arising from climate change to traditionally underrepresented and impacted communities.
- Engage traditionally underrepresented and impacted communities in processes to craft meaningful solutions that are integrated into funding decisions.

Overview of Public Engagement Process

The public engagement process extended from mid-March to early June 2022, and included:

- A kick-off webinar with the Oregon Conservation Partnership (OCP) in March to share opportunities for engagement (e.g., listening sessions, survey) and the goals for the process;
- Six virtual listening sessions held in April and May;
- A tribal virtual listening session held in May;
- An online survey, open from mid-March to early June;

- Individual conversations with OWEB staff, as requested by partners; and
- Consultant interviews with non-traditional partners[1].

Public listening sessions

The agenda for the two-hour, virtual public listening sessions consisted of an opening presentation that provided an overview of the Climate Resolution, public engagement process including goals and opportunities to provide input, and rulemaking; an open opportunity to share concerns and opportunities presented by the Climate Resolution; small breakout group discussions to identify challenges and opportunities associated with resolution implementation as well as resources and support needed to successfully integrate climate considerations into projects; and breakout group report-back to share key points.

Small breakout group discussions focused on 4 questions:

1. What opportunities and challenges do you see with building greenhouse gas emissions reductions, carbon sequestration and storage into your projects?
2. What opportunities and challenges do you see with building climate-smart adaptation and resilience into your projects?
3. What can OWEB do to help current and prospective grantees build climate considerations, such as impacts, adaptation, and mitigation, into their projects?
4. What's one important thing that OWEB needs to know as they think about rulemaking to include climate-focused evaluation criteria in grantmaking?

In total, 77 unique participants attended the listening sessions, with some of those participants attending multiple sessions. The majority of those in attendance identified their role as Executive Director/Coordinator or Project/Program Manager (Figure 1) and affiliation as Soil & Water Conservation District/Watershed Council or Non-Profit Organization (Figure 2). Participants from all 6 of OWEB's regions attended, with the majority attending from Region 3 – Willamette Basin (Figure 3).

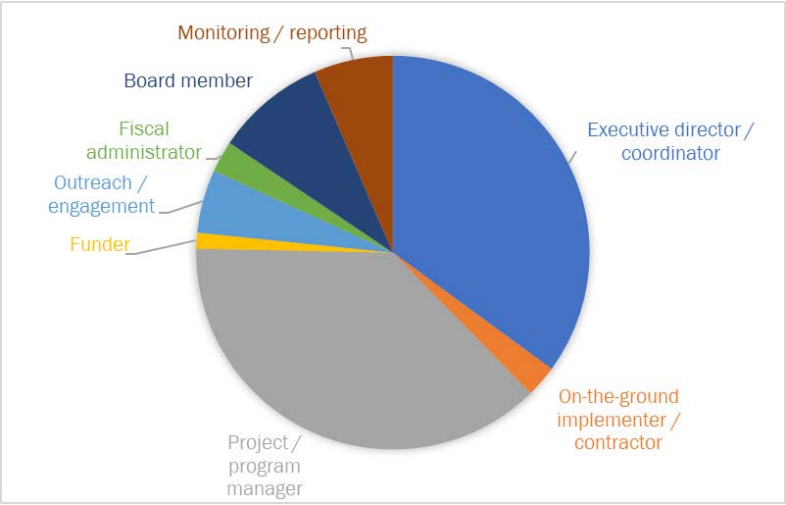

Figure 1. Role as selected by listening session participants.

[1] Input from these interviews is included in this report as part of the key findings. For more information about interview methods and participants, please see a separate report provided by the consultant, ECONorthwest.

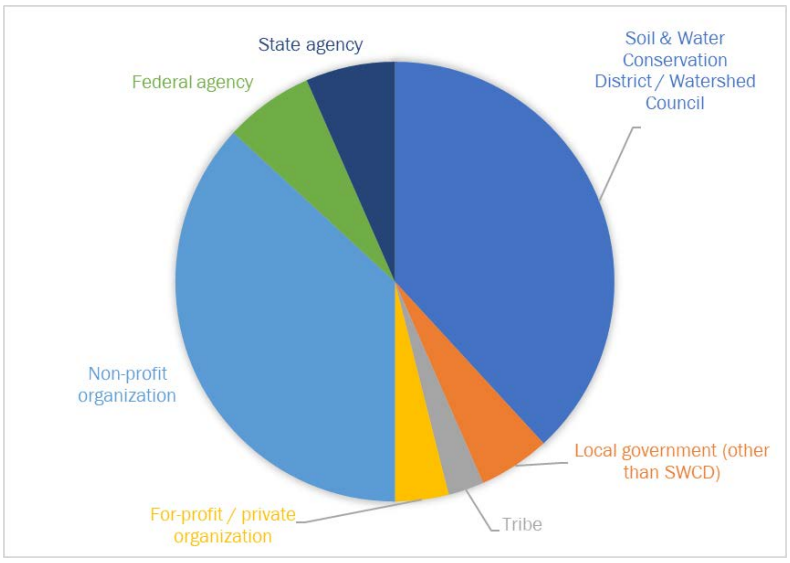

Figure 2. Affiliation as selected by listening session participants.

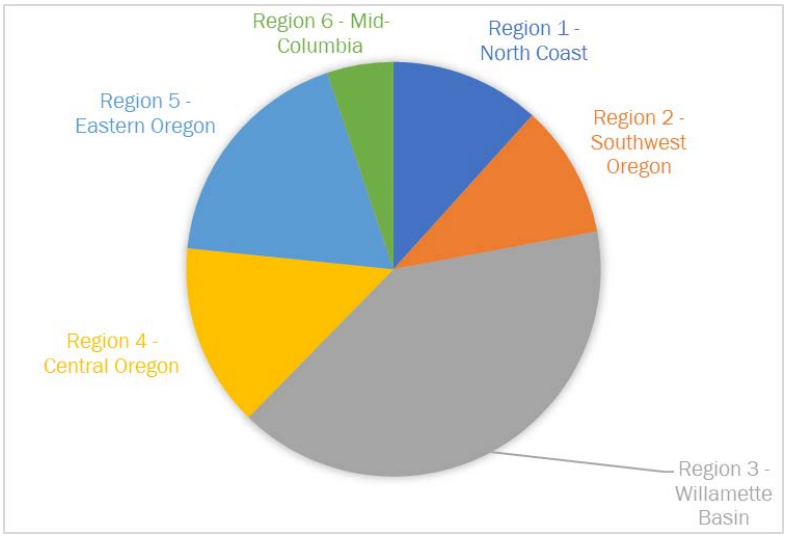

Figure 3. OWEB region affiliation selected by listening session participants.

Tribal Listening Session

The tribal listening session followed the same agenda as the public listening sessions (described above) however, all questions were discussed as a large group. Sixteen representatives from 8 Tribes attended, including the Burns Paiute Tribe; Confederated Tribes of Coos, Lower Umpqua, and Siuslaw Indians; Confederated Tribes of Grand Ronde; Confederated Tribes of Siletz Indians; Confederated Tribes of the Umatilla Indian Reservation; Confederated Tribes of Warm Springs; Coquille Indian Tribe; and Cow Creek Band of Umpqua Tribe of Indians.

Online Survey

The online survey offered participants the opportunity to share feedback on implementation of the resolution anonymously and included the same questions as the virtual listening sessions.[2] A total of 44 survey responses were received.

Summary of Input Received

The following sections share summary input from the public listening sessions, tribal listening session, interviews with non-traditional partners, and online survey. Input is organized by:

1. Key Findings: Rulemaking Considerations
2. Key Findings: Broader Concerns and Opportunities
3. Summary Input on Climate Resolution:
    a. Opportunities and challenges related to building greenhouse gas emissions reductions, carbon sequestration and storage into projects
    b. Opportunities and challenges associated with building climate-smart adaptation and resilience into projects
    c. Opportunities and challenges related to incorporating diversity, equity, inclusion (DEI), and environmental justice principles when making funding decisions
    d. What to consider as OWEB initiates outreach and engagement to traditionally underrepresented and impacted communities

Rulemaking Considerations

Develop broad evaluation criteria. Criteria should be broad, allowing people to think outside the box to achieve goals in unexpected ways. Having more flexibility in terms of what kinds of improvements and enhancements are helpful will allow for a diversity of ways to achieve climate mitigation and adaptation benefits.

Maximize all project benefits. Climate change mitigation and adaptation are two project benefits that overlap with many others. Consider what criteria maximize natural resource, human community, and climate benefits while minimizing the burden on grant applicants. Participants recommended OWEB programs strike a balance between helping projects optimize and track beneficial mitigation and adaptation impacts without detracting from the ecological project benefits it has always prioritized.

Start qualitative and move to quantitative in grant applications and evaluation criteria. Quantifying emissions reductions, carbon sequestration and storage, and adaptation and resilience benefits are a significant challenge. The available data, tools, and process vary by habitat and project type, making it difficult to standardize and therefore compare benefits across projects. Most applicants do not currently have the capacity or expertise to proactively identify emissions reduction or sequestration potential nor to develop and conduct the monitoring that would be required to track emissions and adaptation impacts over time. Qualitative descriptions of mitigation and adaptation benefits may be an appropriate first step, with quantitative estimates coming later as the science, tools, and data evolve. OWEB could develop a common tool to measure and track emissions reduction

[2] The survey did include specific questions related to the diversity, equity, and inclusion and engagement of traditionally impacted and underrepresented communities bullet points in the Climate Resolution.

or sequestration potential from a restoration project and quantify long-term adaptation and resilience benefits.

Consider tradeoffs associated with mitigation-based criteria. For example, some project activities will release significant carbon (e.g., prescribed fire and/or fuels reduction projects, oak release projects), but could prevent more carbon from being released in the future (e.g., prescribed fire lessens chance of catastrophic wildfire, which would ultimately release more carbon). Smaller-scale projects may be at a disadvantage if looked at from a mitigation perspective (i.e., when considering emissions generated from project activities compared with longer-term sequestration benefits, they may not translate benefits as well compared to larger projects with larger benefits). The ability to sequester carbon varies per property/geographic location and/or habitat type; for example, meadow or floodplain restoration projects may not ultimately sequester as much carbon as upland forest projects. Lastly, there may be projects for which emissions reductions are simply not possible (e.g., those in rural areas that require driving long distances to access project sites).

Re-examine potential project longevity and/or modify projects using a climate lens. How long will our investments be valid? Is there longevity in the efforts we make now? This is an opportunity to re-examine current practices and tweak projects to better address climate impacts, become more efficient, and/or revise priorities (e.g., one project component becomes more important to pursue given climate considerations).

Flexibility is key. Climate science, tools, and practices evolve and change rapidly, so it will be important to revisit, update, or revise rules and/or guidelines to account for our state of knowledge evolving over time. Establish a feedback loop to get input from partners to see what is working and what is not and make changes accordingly. OWEB programs should honor multiple ways to connect with and enjoy the natural world. Having more flexibility in terms of what kinds of improvements, and enhancements are helpful will allow for a diversity of ways to access nature.

Be clear about definitions and expectations of grant applicants. Build a shared understanding of what "climate-smart" and other terminology means and provide guidance and resources. Define expectations, including what are considered "good" answers to application questions.

Put traditionally underrepresented and impacted communities at the table with decision-making power. For example, the Tribes have understanding about resilience that should be centered in this work, and traditional practices offer a framework for climate solutions.

Develop and apply a predetermined equity lens. This can help prioritize funding to community members who are being impacted first and most significantly by climate change. Consider ecosystem services for those communities: their loss(es) or those they need to be replaced or enhanced.

Broader Concerns and Opportunities

Restoration equipment transitions will be challenging. Electric options for heavy equipment used in restoration projects are non-existent or extremely limited and expensive. Statewide, there is a lack of access to charging equipment/infrastructure to support electric equipment. Larger contractors with more funds may be able to adopt climate-smart changes more quickly, leaving local, small contractors at a disadvantage.

Applicant capacity varies. These are new skills and grant applicants will need information, guidance, trainings/classes, and tools to respond and engage in these new parameters effectively.

Be aware of unintended consequences. For example, some culturally significant plants could fall under the carbon sequestration umbrella, which could prevent Tribes from harvesting.

Emissions reductions opportunities may be possible. There may be opportunities to cut emissions in everyday tasks and projects (e.g., driving less/shorter distances, localizing work, coordinate with other grantees when hauling materials) or purchase less carbon-intensive materials (i.e., reducing carbon intensity of a project through materials if transition to electric equipment is not possible).

New funding opportunities could arise. This may be an opportunity to attract new climate-centric funders or funding partners and could lead to opportunities to leverage additional funds for grant applicants. There may be opportunities to align evaluation criteria with federal funding programs also defining or requiring consideration of climate adaptation, resilience, and/or mitigation.

Best practices, case studies, and demonstration projects are effective tools to help applicants integrate climate-smart considerations into projects. Develop a suite of best practices and guidance for low-carbon restoration (e.g., guidance on construction materials, vehicles, and tools), including the benefits of cleaner fuels and project gains, that helps applicants understand and evaluate options. Develop examples of climate-smart practices and management measures, including those that do/do not work in different regions (i.e., a how-to manual that includes things *not* to do). Tailor climate change information to the project level to aid grant applicants in understanding local impacts and adaptation options. Highlight organizations implementing emissions reductions, carbon sequestration and storage, and/or adaptation and resilience in their projects and spread know-how to others.

Invest time in developing long-term relationships. OWEB will need staff capacity to build relationships and trust and shared purpose for engaging. Be careful that incorporation of diversity, equity, inclusion, and environmental justice principles does not unintentionally promote transactional or extractive relationships between OWEB and/or grantees and these communities.

Summarized input on opportunities and challenges related to building greenhouse gas emissions reductions, carbon sequestration and storage into projects

Primary challenges identified by participants included quantification and monitoring of emissions reduction and/or sequestration potential, equipment transitions, and capacity and equity. In many cases, participants developed potential solutions or options to help alleviate some of the challenges that were identified. Primary opportunities identified included finding efficiencies in projects, leveraging funding, and education and outreach. The importance of understanding and balancing tradeoffs was also identified.

Quantification & Monitoring of Emissions Reductions and/or Sequestration Potential

Major Challenges

- Learn how to measure data from current, funded projects so that grantees (and OWEB) get credit for the work already being done
- From a state climate mitigation perspective, it would be valuable for OWEB to track emissions reductions from projects as one potential metric for progress toward meeting the Oregon Global Warming Commission's natural and working lands sequestration goals.
- Most applicants do not have the capacity or expertise to proactively identify emissions reduction or sequestration potential nor to develop and conduct the monitoring that would be required to track emissions impacts over time. If OWEB seeks high rigor for estimates of sequestration or avoided emissions or requires long-term monitoring, applicants will need significant assistance both in application preparation and monitoring and tracking, either directly or through a third-party contractor.
    - High-rigor estimates may not be realistic, especially for smaller projects; approaches that track practices known to cause carbon sequestration or emissions reduction may be more feasible than trying to measure these effects directly.
    - It is difficult to establish/determine baseline data and then build the carbon budget, which is highly situational.
    - Quantifying carbon sequestration and emissions levels are both extremely technical and time consuming. Sequestration rates can widely vary species to species and even geography to geography. Similarly, with emissions, quantifying emissions from one type of gas-powered bulldozer to another can vary. Finding a way to standardize emissions reductions and carbon sequestration is a huge challenge, especially for small organizations with limited time and expertise. It is important for OWEB to do this work to ensure consistency and reduce the burden on grantees. This is extremely complex and there are many assumptions built into reduction/sequestration estimates.
- Additional greenhouse gas (GHG) tracking challenges: When quantifying carbon sequestration or other GHG reduction benefits, it will be critical to define the counterfactual against which the GHG reduction benefit from a project is determined.
- Another challenge is defining the appropriate time horizon for evaluating GHG reduction benefits. If OWEB requires project applicants to quantify the potential benefits (in terms of GHG reductions) from their projects, we encourage OWEB to

develop clear guidance for applicants to help them determine the best methods for quantification that include counterfactuals and time bound estimates.
    - Think about the project lifecycle; there could be a lot of expenses that get lost and not tracked within the lifecycle of 10+ years. Similarly, how would we quantify monitoring the project over a longer-term timeframe?

Solutions

- Offer additional funding for extended monitoring timeframes (current framework inadequate to truly learn monitoring lessons).
- Develop metrics and a common tool to measure and track the amount of carbon that could be released from a restoration project and quantifying long-term resilience benefits.
    - OWEB could consider getting outside expertise to develop criteria and metrics
    - Developing a calculator could be an OWEB grant in itself; if so, it should involve a consortium of agencies and organizations who work together to develop and continually refine a calculator that is reasonably simple, accurate, and consistent.
- Include guideline(s) for how to implement sequestration monitoring (e.g., for organizations without the knowledge and/or capacity to figure this out before the application deadline).
- There are multiple tools for estimating greenhouse gas emissions and there is the expensive route of validating them. Who is responsible for the calculations?
    - Every applicant may calculate carbon differently; a consistent, streamlined system for how these impacts and benefits are measured by grantees and reported to OWEB is needed.

Equipment Transitions

Major Barriers/Challenges

- Electric options for heavy equipment used in restoration projects are non-existent or extremely limited.
- Converting to more efficient equipment is expensive, and specialized equipment can cost a lot more than conventional equipment.
- Mobilization and transportation costs are higher for projects in remote locations.
- Added costs to maintain new equipment.
- Lack of access to charging equipment/infrastructure.
- Lack of access to materials, supply chain issues.
- Time needed to transition/convert to new equipment varies (e.g., months, years, decades).
- Perception that electric equipment is not as efficient or effective at getting the job done.
- Rural communities have limited options for contractors; we want to support our local contractors and local economy, rather than sourcing contractors from other locations (e.g., Eugene, Portland) that have newer, more efficient equipment and/or access to more efficient materials.

Tradeoffs

- If the new rules increase construction and implementation costs, there is concern it could restrict other parts of the restoration work (i.e., money that would have been used for more on-the-ground restoration is now redirected to cover costs with upgrading equipment).
- Incentive to make climate-smart changes to equipment could be limiting given the vast amount of conventional work that is currently available for contractors.
- Would the project be classified as lower priority if the applicant is unable to acquire/access better vehicles and/or electric equipment?
- If bigger companies are better suited/able to adopt climate-smart changes more quickly, it could leave local contractors at a disadvantage (i.e., because they cannot adopt new changes as quickly).
- It could reduce the contractor pool (e.g., if contractors have difficulty transitioning to electric equipment), which could increase contractors' prices.

Solutions

- Begin dialogue with contractors on when/how/why to transition equipment.
- Build in phase-in time and consider renting vs. owning.
- Provide incentives for moving towards tool/equipment conversion; incentive could involve funding to switch or rewarding contractors who have already switched.
- Consider funding a pilot project for purchasing/using smaller electric tools, which could provide real data to help contractors see the benefit.
- OWEB could consider partnering with Business Oregon or another agency/organization to establish small business grants/loans to contractors to upgrade equipment.
- Consider budget line items to pay for equipment with zero emissions.
- Create a funding source for grantees/contractors to purchase low carbon emissions vehicles or equipment.
    - For example, could OWEB offer a one-time investment for each watershed council or soil and water conservation district receiving a council capacity grant to purchase an electric vehicle (car or truck)?
    - Is there a possibility for new startup contractors to partner with existing contractors, to fill in resource or equipment adaptation gaps? Would that create different jobs for those who were not in the room to begin with? Would that create a new partnership?

Capacity and Equity

- Lack of capacity, funds, time, and technical knowledge. These are new skills and grant applicants will need information, guidance, trainings/classes, and tools to respond and engage in these new parameters effectively.
- Inequities may be especially evident in small, rural organizations, projects, and/or contractors.

Box 2: Understanding Tradeoffs

- Some project activities will release significant carbon (e.g., prescribed fire and/or fuels reduction projects, oak release projects); how do we balance tradeoffs and account for avoided emissions of projects (e.g., prescribed fire lessens chance of catastrophic wildfire, which would ultimately release more carbon)?
- Smaller-scale projects may be at a disadvantage if looked at from a mitigation perspective (i.e., when considering emissions generated from project activities compared with longer-term sequestration benefits, they may not translate benefits as well compared to larger projects with larger benefits).
- Project differences:
    - Some projects have few opportunities to cut emissions.
    - Ability to sequester carbon varies per property/geographic location.
    - Projects that require the use of heavy equipment with no electric equipment or climate-smart manufactured material alternatives (e.g., culvert replacement project) that have significant ecological benefits (e.g., fish passage improvement).
- Concerns around treaty rights and access to cultural harvests; for example, some culturally significant plants might fall under a carbon sequestration umbrella, which could prevent Tribes from harvesting.

Efficiencies in Projects

- Opportunities to cut emissions in everyday tasks and projects (e.g., driving less/shorter distances, localizing work, coordinating with other grantees when hauling materials).
- Rather than transitioning to brand new electric equipment, purchase less carbon-intensive materials (i.e., reducing carbon intensity of a project through materials if transition to electric equipment is not possible).

Leveraging Funding

- Opportunity to incentivize “green” methods, including leveraging other funding sources by adopting greener techniques.
- May be an opportunity to attract new climate-centric funders or funding partners and could lead to opportunities to leverage additional funds for OWEB itself as well as grantees/applicants.
- Projects that aim to sequester carbon may also, depending on project design, be able to leverage additional funding for "climate mitigation" projects from other sources, from philanthropic to carbon market/offset revenue. OWEB should have clear eligibility guidance for projects with carbon offset components; this guidance should ensure any OWEB-funded projects that anticipate selling carbon credits meet high thresholds for additionality (i.e., not selling credits for conservation that would have occurred absent carbon credit revenue) and consider OWEB program goals.

Education & Outreach

- Continue to recognize projects that sequester carbon (e.g., beaver dam analogs and process-based wetland restoration) that offer additional climate-smart benefits (e.g., resilience).
- Develop a suite of best practices and guidance for low-carbon restoration (e.g., guidance on construction materials, vehicles, and tools) that helps applicants understand and evaluate options and associated emissions.
    - *Note that these reductions, if tracked, should be tracked separately from "natural climate solution" impacts as state inventories typically track these emissions in other sectors
- Diversify opinions and approaches to implementing emissions reductions into projects and highlight both human community and climate benefits.
- Demonstrate the benefits of cleaner fuels and gain of projects; is it just a very small gain, and should the benefits really be measured by the ecosystem benefits of the work completed?
- Highlight organizations implementing emissions reductions and/or carbon sequestration and storage in their projects and spread know-how to others; for example, highlight demonstration projects using electric equipment.
- Improve understanding of the capacity of electric tools to get the job done (i.e., there is a perception that electric tools are not powerful enough).

Summarized input on opportunities and challenges associated with building climate-smart adaptation and resilience into projects

Primary challenges identified by participants included quantification and monitoring of adaptation and resilience benefits and capacity. Primary opportunities identified included new funding and/or leveraging funding, expanding climate-smart approaches, and education and outreach.

Quantification & Monitoring

- Measuring climate resilience and adaptation is a challenge.
- We need good data – how do we articulate the benefit of the climate work and monitor the impacts? Need a robust investment in pre- and post-monitoring to articulate the climate benefits of the work.
- Assume OWEB-funded projects are already doing this.
    - How do we quantify existing work?
    - How do we compare one project against another?
    - How do we analyze metrics to determine project success?
    - How will OWEB evaluate metrics?
- Invest in working with experts to understand the most meaningful ways that grantees are already providing climate adaptation and mitigation benefits and include those as "boxes to check" on grant applications.
- Request basic information (e.g., acres of floodplain restored, # of native trees planted, etc.) so that mitigation and adaptation benefits can be calculated (by OWEB staff or consultants). These "boxes to check" could be the specific metrics determined by experts and identified by OWEB staff to represent climate benefits of OWEB-funded ecological restoration, similar to the specific metrics grantees are already required to report on for habitat restoration.

Capacity

- Lack of technical expertise, access to data and information, time, and funding.

New Funding and/or Leveraging Funding

- Create grant opportunities that help explore the adaptation and mitigation benefits from grantees' existing or emerging work, or work that may be important in the future (e.g., monitoring and research funding to understand the possible climate benefits of floodplain restoration work - for example, does restoration improve alluvial aquifer storage, helping cool the creek in a warming climate?)
- Consider creating a climate Focused Investment Partnership (FIP) grant offering.
- Provide direct resources/funds to partners for capacity-building for water-related projects (e.g., acquisitions) that support long-term drought resilience.
- Create new funding sources to support community engagement in new ways.
- OWEB funding could be better leveraged to increase resilience of Oregon watersheds and landscapes to climate change. Many organizations are already considering climate adaptation and resilience for future restoration and protection projects, and a great deal of high-quality restoration work is already happening in our state. OWEB

funding could provide an opportunity to push more projects to fully incorporate climate-smart adaptation and resilience. There may also be opportunities to align evaluation criteria or guidance with federal funding programs also defining or requiring consideration of climate adaptation and resilience.
- Provide funds to retrieve climate-related metrics on current/past projects and share results to help make continued, sustained change.
- Create small grants for outreach to tell stories.
- Integrate a climate lens into agricultural grant programs (e.g., OAHP), providing monetary incentives to farmers/ranchers for practices that have the potential to sequester carbon and promote resilience, but avoid monitoring and verification requirements (or people will not engage as you hope they will).

Expanding Climate-Smart Approaches

- Opportunity to re-examine potential project longevity. How long will our investments be valid? Is there longevity in the efforts we make now? Will they still be effective ten years into the future?
- Opportunity to tweak projects even further to grow climate lens, become more efficient, revise priorities (e.g., one project component becomes more important to pursue given climate considerations), etc.
- Fund and encourage practitioners to use a more holistic approach (e.g., the opportunity to be efficient in combining actions to restore a basin).
- Majority of people are thinking about climate when applying for OWEB grants, but this might incent people to think of new ways/think outside the box on the work they do (i.e., connecting the dots in new ways).

Education and Outreach

- Build a shared understanding of what "climate-smart" and other terminology means and share that widely throughout the state.
- Recognize the work that grantees are already doing to help mitigate and adapt to climate change and improve watershed resilience.
- Assist and support grant applicants/grantees in articulating the benefits of the work they are doing for climate resiliency.
- Improve understanding and have training on what these climate topics are and how to build them into projects, including how to monitor and track changes as well as report outcomes.
- Provide standardized trainings for habitat restoration practitioners (e.g., site preparation, guidelines to begin these practices with climate-smart lens).
- Develop examples of practices and management measures, including those that do/do not work in different regions (i.e., a how-to manual that includes things *not* to do).
- Opportunity for broader social engagement on how this affects everyone; also, an opportunity to increase communication amongst landowners and adjacent sites.

Summarized input on opportunities and challenges related to incorporating diversity, equity, inclusion (DEI), and environmental justice principles when making funding decisions

- Historically underserved populations often are impacted most heavily by climate change. Put these populations at the table with decision-making power. For example, the Tribes have understanding about resilience that should be centered in this work.
- Oregon's Tribes possess significant traditional ecological knowledge that should be incorporated into the process.
- Think about the capacity of the Tribes when making the funding decision. How can they best utilize the funds? Does the reporting create a burden to their administration?
- Flexibility in definitions. There is no "one way" to connect with and enjoy the natural world. Having more flexibility in terms of what kinds of improvements, and enhancements are helpful will allow for a diversity of ways to access nature.
- Explicitly consider "benefits" and "burdens" from conservation projects and status quo using disaggregated socio-economic data whenever possible (note that this is likely beyond the technical capacity of many grantees and would require significant technical support, or to be done by OWEB).
- Find ways to support engagement - open, honest engagement without pre-determined outcomes (look to Oregon Health Authority funding opportunity that supported climate change and community engagement work).
- Consider including outreach funds in various grant opportunities. Projects will be enhanced by connecting with traditionally underrepresented and impacted communities, but often those communities are not already connected with the organizations doing OWEB-funded work.
- Work with groups that are already working in these communities to develop rules and programs that address these principles. Be prepared to pay them for their time.
- Lower the match requirement and make the grant programs more accessible for traditionally underrepresented and impacted communities. Part of this would involve providing more capacity to smaller watershed councils or providing state agency support for implementing programs.
- Integrating these principles is not going to be a one-size-fits-all consideration with climate change. The challenge is how to balance prioritizing these principles with other priorities.
- OWEB should consider integrating these principles throughout the agency, as inequities and injustices exist in all facets of conservation work. Evaluate where OWEB is relative to the DEI goals for external projects. What is the diversity of the OWEB board and program staff? Is there opportunity to increase diversity internally?
- Integrating these principles into conservation and restoration work takes time and money. Organizations want to do the work, but it demands committed investment - to listen, learn, show up, and not bring pre-determined outcomes or demands to the table. Can OWEB support this time or partner with a funder than can support this time?

    - Consider the cost of building relationships and partnerships prior to the grant application. Collaborative engagement is not free and, at a minimum, should be able to be counted as in-kind match towards the project application.
- Small, underrepresented groups need unique funding assistance with upfront funding to support better proposal development
    - Some grant programs have explored small incentive 'offsets' for capacity/funding-limited organizations to simply apply, because difficult/complex application processes are an innate systematic barrier to small organizations that may otherwise provide a great deal of value towards DEI and environmental justice goals.
- Ask applicants to include DEI principles and concepts in the development of their projects, as applicable. Grant reporting on DEI should be open-ended as it is challenging to define, qualify, and quantify diversity, equity, and inclusion in relation to project-based options and decisions.

Summarized input on what to consider as OWEB initiates outreach and engagement to traditionally underrepresented and impacted communities

- Increase effective outreach to a broader suite of potential applicants—using more listservs, doing direct outreach to organizations representative of underserved communities, and creating space outside of traditional working hours for questions and discussion of grant opportunities. Specifically, find time to engage traditionally underrepresented communities outside of traditional working hours, within other forums that may only be tangentially watershed-related, and/or provide compensation and technical support to qualifying organizations that would otherwise be unable to competitively apply for OWEB grants.
    - Offer opportunities for both in-person and virtual communication.
    - Utilize trusted community organizations for outreach.
    - Pay people to participate. Provide incentives and resources as needed.
    - Offer translation services/materials in various languages.
    - Record meetings and rebroadcast them with a live person available to answer questions.
- Find and encourage techniques that will include a broad spectrum of people in the discussion, including outside facilitators and new approaches to outreach.
- OWEB's FIP program may be a useful model for how to approach longer-term relationship and capacity building with communities and organizations that need additional support to be able to apply for OWEB grants.
- Invest time in developing long-term relationships; be careful that incorporation of these principles does not unintentionally promote transactional or extractive relationships between OWEB and/or grantees and these communities.
- There is an opportunity to work with Black, Indigenous, and People of Color (BIPOC) organizations to get this work done. Need more outreach and BIPOC staff/board members that understand these communities.
- Seek the perspective from organizations that have established relationships with these impacted communities.
- Focus on ecosystem services to those communities: their loss(es) or those they need to be replaced or enhanced.
- Approach frontline and environmental justice communities through an "asset based" versus a more common "deficit based" lens to help promote community agency and self-determination.
- This is an opportunity to engage tribal traditional ecological knowledge more fully into project prioritization, planning and design options.
- First, identify who is being impacted and then show up prepared to acknowledge previous (and current) injustices and inequities in the way OWEB administers its grant programs. Be open to concerns and integrate representatives from traditionally underrepresented and impacted communities in formal decision making.
- Encourage these communities to identify opportunities and challenges both for outreach efforts and for funding efforts to help them mitigate and adapt to climate change.

- Be flexible and tailor the approach to each community. Avoid creating one solution for all.
- OWEB will need staff capacity to build relationships and trust and shared purpose for engaging.

CLIMATE RESOLUTION PUBLIC ENGAGEMENT PROCESS – ALL INPUT RECEIVED[1]

This document includes input from public listening sessions, tribal listening session, online survey, and one-on-one conversations[2]

July 2022

TABLE OF CONTENTS

[1] The opinions expressed in this document are taken directly from the public listening sessions, tribal listening session, online survey, and one-on-one conversations and reflect the wording/phrasing used by participants.
[2] Input is from the public listening sessions and one-on-one conversations unless otherwise noted. τ = input from tribal listening session; σ = input from survey

1. What opportunities and challenges do you see with building greenhouse gas emissions reductions, carbon sequestration and storage into your projects?

I. Efficiencies

- Encourages folks to consider cutting emissions in everyday tasks (e.g., when driving to different restoration projects, making multiple stops to save total mileage)
- Find ways to share services with other organizations or entities doing similar work; for example:
    - Cooperation when hauling materials (e.g., if OWEB funded multiple projects in a region, collaboration between grantees is possible where contractors cooperate to save money by completing jobs for adjoining organizations)
    - Forming new partnerships (e.g., with colleges; could teach and hire students to complete the same work)
- Recognize the work that OWEB has already funded – would be interesting to see how much carbon has been captured [T]
- Streamline projects by localizing a season's work (this helps reduce emissions by removing excess travel to/from sites)
- Driving less or driving shorter distances became easier with COVID; could use this momentum as an opportunity to ask landowners to take photos (i.e., instead of driving) or install a trail cam
- Rather than transitioning to brand new electric equipment, purchase less carbon-intensive materials (i.e., reducing carbon intensity of a project through materials if transition to electric equipment is not possible)
- Integrate cleaner burning technology in slash and waste burning, possibly in sage-grouse restoration (i.e., similar to using an air-curtain burner to burn orchard waste)
- We see tremendous opportunity in durable sequestration. Pacific Forest Trust has long been at the forefront of the effort to leverage forests for their climate mitigation potential. New climate criteria in the OWEB grant process would provide us and other conservation organizations the opportunity to expand our impact. Mitigation and resilience go hand in hand with durable maintenance of natural system characteristics, which also provide significant benefits for water and biodiversity. A focus on the long-term sequestration and climate resilience benefits of a project will allow OWEB to maximize the impact of each dollar it distributes.

II. Equipment Transitions & Contractors

- Transitioning contractors in rehab, restoration, and/or heavy equipment over to more responsible equipment in a timely and cost-effective manner
- Converting to more efficient equipment is expensive and cost prohibitive according to many contractors; there are only a few contractors in southern Oregon who can do habitat restoration work effectively and efficiently and we cannot afford to lose these folks
- Equipment for adding wood and shaping channels is diesel, and electric equipment is not available [σ]
- Specialized equipment can cost a lot more than conventional equipment [T]

- Most of our projects involve the use of heavy equipment that use diesel fuel – I don't know of any practical alternatives. σ
- If the new rules increase construction and implementation costs, will this restrict other parts of the restoration work?
- For projects in remote locations, mobilization and transportation costs could be a detriment
- Major machinery/heavy equipment is needed to get big habitat projects done; that work could not be performed with non-diesel equipment
- Build in phase-in time, and consider renting vs. owning
    - Machinery costs a lot of money, so need serious incentive to transition; if renting, will OWEB cover the differential to make the switch?
- Costs to maintain new equipment
- Potential roadblocks for remote projects:
    - Charging equipment (e.g., if using a gas-powered generator for charging, then why transition since still burning fossil fuels)
    - Lack of access to electricity/ability to charge, materials, and/or assistance in rural/remote areas; risk of not funding great projects in rural Oregon if emissions reductions weighted too heavily
    - Eastern Oregon projects have less access or infrastructure in place for electric tractors/vehicles
- Incentive to make climate-smart changes to equipment could be limiting given the vast amount of work that is currently available
- Supply chain issues (e.g., it may be difficult to get upgraded equipment)
    - Supply chain demands for monitoring can make it difficult to navigate where to invest time and energy (for landowners and technical service providers)
- Certain restoration projects (e.g., in estuaries; floodplain reconnections) takes highly specialized equipment and new technology (i.e., electric) is not yet available
- In many locations, there are already significant barriers to finding the right equipment and the right contractors; adding another requirement enlarges the barriers
    - Would the project be classified as lower priority if the applicant is unable to acquire/access better vehicles and/or electric equipment?
    - More rural areas may not have the resources to compete
    - In Grant County, resources are not available for contractor(s) to be able to switch to some of the better practices such as using electric vehicles, and any adaptations for the contractor will come over a longer period as that infrastructure become more readily available
- New equipment opportunities
    - Begin dialogue with contractors on when/how/why to transition equipment
    - Encourage contractors to use electric tools (e.g., ground crews); some concerns about viability, but it can save money over time (i.e., no cost for gas)
        - Find ways to help contractors make the transition; primary barrier is the upfront cost to buy new equipment, although transition speed is also a challenge
        - Great opportunity to find innovative ideas
    - Provide incentives for moving towards tool conversion; incentive could involve funding to switch, or rewarding contractors who have already switched

    - Consider funding a pilot project for purchasing/using smaller electric tools, which could provide real data to help contractors see the benefit
    - OWEB could consider partnering with Business Oregon or another organization to establish small business grants/loans to contractors to upgrade equipment
    - For restoration projects, there might be opportunities and/or incentives for contractors to modify equipment [T]
    - Are there ways that OWEB can incent the type of contractors that the agency wants to see (i.e., how do we encourage folks to purchase more efficient equipment)? For example, consider incentives for contractors to modify equipment, particularly in remote areas. [T]
- Sourcing contractors:
    - Goal is to get some local folks; working in rural areas there are fewer options
    - Rural communities have limited options for contractors; we want to support our local contractors and local economy, rather than sourcing contractors from other locations (e.g., Eugene, Portland) that have newer equipment
    - If bigger companies are better suited/able to adopt climate-smart changes more quickly, it could leave local contractors at a disadvantage (i.e., because they cannot adopt new changes as quickly)
    - Could reduce the contractor pool (e.g., if contractors have difficulty transitioning to electric equipment), which could increase contractors' prices
    - Keeping local contractors (e.g., Marion County has contractors from Salem and Santiam; if we focus too much on emissions reductions, many of these folks would not be able to compete)
    - Challenges with building cost estimates and budgeting (e.g., if we need to use contractors that are farther away, mobilization costs, housing, and other costs would be higher)
    - How wide do we cast the net? (e.g., contractor sourcing piping from Eugene rather than from Louisiana to reduce emissions and support local business)
    - Contractors are difficult to find due to the current economy; this could make it worse
    - Challenging to see how they can require contractors to have certain low emissions equipment. Some projects are very remote and, while it is a great thing to consider, on-the-ground it may be frustrating where there are not a lot of options. [T]
        - Concerns around remote areas with fewer contractors [T]
        - How does this work in practice? For example, is it using labor with hand saws instead of machines? [T]
    - Especially challenging for some projects where there is only one contractor who can do the work they need (e.g., tree placement), and he is busy and moves all around the west side of the state [T]
    - Is there a possibility for new startup contractors to partner with existing contractors, to fill in resource or equipment adaptation gaps? Would that create different jobs for those who were not in the room to begin with? Would that create a new partnership?
    - Most contractors will not be able to afford this conversion and will stop working on watershed restoration projects if required to convert [O]

    - Opportunities for projects vary, and there may be challenges with finding contractors that align with climate resolution requirements (e.g., may be highly unrealistic for some requirements) σ
- Many contractors purchase vehicles at government auctions (i.e., as governments upgrades their fleet); if contractors are not able to purchase these older vehicles, this would be a major shift in their current business practices
- There are opportunities to move away from fossil fuels and find more efficient alternatives, but the challenges include expense and availability of dependable alternatives. σ
- Most of the opportunities to reduce emissions are tied to contractors who cannot convert their equipment and machinery to electric-powered versions on any time scale that will support our continuing projects. For example, not sure we have an EV D9 cat for excavation work available on the market at this time. Conversion could take many years, if not decades, to achieve without subsidies or incentives. Will OWEB consider budget line items to pay for equipment with zero emissions? σ
- Lack of availability of eco-friendly equipment for restoration (especially in post-COVID world), contractor availability, and cost σ
- Opportunity for land trust to cut GHG emissions internally though purchase of electric equipment and our investments σ
- Asking contractors to reduce their emissions may be difficult; electric machinery (chain saws, weed eaters, etc.) are not as efficient at getting the job done σ

III. Funding

- Leverage other funding sources by adopting greener techniques
- Offer additional funding for extended monitoring timeframes (current framework inadequate to truly learn monitoring lessons)
- If OWEB can pull together analytics and tools, it may lead to opportunities to leverage additional funds for OWEB itself as well as grantees/applicants
- Consider increasing grant funds for small projects (vs. large-acreage projects), as smaller projects may have greater carbon savings (i.e., in site prep and initial implementation) as well as greater long-term success for carbon sequestration (i.e., because of an increased focus on plant survival)
- Promote and incentivize practices like cover-cropping, perennial crops/shrubs/trees, riparian plantings, and other restoration
- Projects that aim to sequester carbon may also, depending on project design, be able to leverage additional funding for "climate mitigation" projects from other sources, from philanthropic to carbon market/offset revenue. OWEB should have clear eligibility guidance for projects with carbon offset components; this guidance should ensure any OWEB-funded projects that anticipate selling carbon credits meet high thresholds for additionality (e.g., not selling credits for conservation that would have occurred absent carbon credit revenue) and consider OWEB program goals. σ
- May be an opportunity to attract new climate-centric funders or funding partners. σ
- This may be an opportunity to incentivize "green" methods σ

- Instead of penalizing grantees/contractors who cannot afford to upgrade to low-emissions equipment, create a funding source for them to purchase low carbon emission vehicles or equipment.

IV. Education

- Highlight both human and climate benefits
- Improve knowledge and understanding of climate science as well as metrics and techniques to capture and share benefits
- Highlight organizations doing these projects and spread know-how to others
- Diversify opinions and approaches to implementing emissions reductions into projects
- Continue to recognize projects that sequester carbon (e.g., BDAs and wetlands) that offer additional climate-smart benefits (e.g., resilience)
- Improve understanding of equipment options and associated emissions
- Improve understanding of the capacity of electric tools to get the job done (i.e., there is a perception that electric tools are not powerful enough)
- Capitalize on the gaining momentum of climate change as an issue (i.e., many people who were previously doubtful about climate change are now beginning to see and have a better understanding of both the terms and impacts)
- The market for land protection and climate mitigation is increasing rapidly; leveraging the story of protecting carbon sinks could help connect grant applicants with resources that are becoming available
- Utilize existing tools such as the Trust for Public Land's map where you can search for a specific parcel and it will provide information on carbon storage
- Find ways to encourage compliance and change in forestry and agriculture, where there is an opportunity to tackle larger-scale sources of emissions and have the most impact
- Projects may also have the opportunity to reduce emissions associated with the actual restoration work—e.g., construction materials, vehicle and tool use. It could be helpful for OWEB, either internally or in consultation with others, to develop a suite of best practices for low-carbon restoration. We support guidance that helps applicants understand and evaluate these options and note that these reductions, if tracked, should be tracked separately from "natural climate solution" impacts as state inventories typically track these emissions in other sectors. σ
- Unclear how to do it, and lack of trust regarding new, emerging science. Maybe not reductions but certainly sequestration would be relatively easy. σ
- Learn and apply best practices for reducing climate/emissions in implementing a project, separate from the long-term sequestration, etc. σ
- There may need to be some education of watershed councils, contractors, and partners. I don't see how we can do larger projects without using diesel or gas heavy equipment or traveling long distance by car or truck. In rural Oregon, local contractors must haul their equipment a long way. I am not aware of any electric-powered backhoes or equipment in use. There is equipment like this on the market, as well as tractors and electric-powered trucks. Perhaps demonstration projects using electric equipment can happen. σ

- Concerns about plant material survival, especially in drought and high heat conditions. We may need to work with Oregon State University soil and plant scientists and the plant nursery industry to make sure plantings survive. [o]
- Shifts in public opinion among farmers and foresters; for example, in my area, folks who once doubted that climate change is happening are increasingly accepting the fact. It seems like many people have an intuitive, but inaccurate, sense of what practices have significant carbon sequestration impacts. [o]

V. Quantification & Monitoring

- Mitigation considerations in restoration projects (i.e., emissions generated through project activities, carbon sequestration and storage) are still fuzzy and will be for a long time
- Quantification of carbon sequestration and emissions generated will be a challenge
    - Hard to measure and quantify impacts (e.g., how much carbon can BDAs sequester, and does this vary throughout the state?); what is the cost of doing/implementing different restoration practices?
    - Quantifying the sequestration level and the metrics – not sure if our science is caught up
    - How to establish/determine baseline data and quantify benefits? It is difficult to figure out the baseline and then build the carbon budget, which is highly situational and difficult.
    - Mary's River Watershed Council has worked with a group to try and determine carbon sequestration for trees they plant and have seen how complex this is and how many methods there are (e.g., varies by tree/shrub species; equipment types, sizes)
    - Who is responsible for the calculations? If grant applicants, it will have an impact on staff (time, budgets) to do this extra work; administrative workload needs to be considered when this program is rolled out
    - Complexities in quantification – time-consuming work within small existing budgets; how do we remove this burden from field teams? Turning to the applicant to figure out quantification could drastically complicate the application process.
    - Will quantification be part of a state baseline scenario?
        - Regarding regulations on fuels and energy efficiency standards – do you want to give credit for something already enforced? Or do you shoot for above and beyond?
        - Regulated industries could be harmed when regulated for carbon emission reduction
    - Will need to consider calculating emissions and emissions reductions for short-term actions and long-term implications
- Every applicant may calculate carbon differently; a consistent, streamlined system for how these impacts and benefits are measured by grantees and reported to OWEB is needed
    - Lots of different organizations who are coming up with metrics and monitoring systems; from an ag perspective, we should streamline and connect with existing systems of tracking

- Calculating carbon is extremely difficult and technical; is OWEB going to provide any kind of assistance with development of these procedures before projects can apply? Feels like a huge obstacle for a lot of projects that are inherently climate resilient, but don't have the means to do these calculations. σ
- Can we measure certain projects' outcomes, specifically how much carbon did we *not* release by funding this project?
- Benefits to producers may not be enough of an incentive to encourage implementation of climate-smart projects
- Telling the story of carbon sequestration in estuary restoration projects takes extra funding and time; these are long-term projects, and the benefits data are not always available
    - A lot of projects take longer to see effective change (especially in terms of carbon sequestration) and smaller-scale modeling may not be as accurate
- Incredibly difficult to create a monitoring system that would be able to fit the breadth of projects that OWEB funds, as well as ecotypes; it could be effective in one area and not in another – not because a project is "better" at mitigation, but because it does it differently
- Develop metrics to help grantees/grant applicants track the amount of carbon a restoration project could release (may help identify ways to reduce emissions)
    - OWEB could consider getting outside expertise to develop criteria and metrics
- Develop a common tool to measure and track the amount of carbon that could be released from a restoration project and quantifying long-term resilience benefits
- Our land trust members recognize that large-scale restoration projects produce greenhouse gases, and these projects currently require significant fossil fuel use (especially with earth-moving machines). We would like to see OWEB take the lead at creating a framework to help us quantify greenhouse gas emissions and to develop a 'best practices' approach to help land trusts and watershed councils reduce emissions. We would also support a work group on this topic. σ
- Find out how to measure data from current, funded projects so that grantees get credit for the work already being done
- Think about the project lifecycle; there could be a lot of expenses that get lost and not tracked within the lifecycle of 10+ years. Similarly, how would we quantify monitoring the project over a longer-term timeframe?
- Include guideline(s) for how to implement sequestration monitoring (e.g., for organizations without the knowledge and/or capacity to figure this out before the application deadline)
- Demonstrate the benefits of cleaner fuels and gain of projects; is it just a very small gain, and should the benefits really be measured by the ecosystem benefits of the work completed? τ
- Research from The Nature Conservancy on "natural climate solutions" has highlighted several actions consistent with OWEB funding programs that could provide opportunities for carbon sequestration and storage. From a state climate mitigation perspective, it would be valuable for OWEB to track GHG emissions reductions from projects as one potential metric for progress toward meeting the Oregon Global Warming Commission's natural and working lands sequestration goals. σ

- Level of rigor for GHG tracking: Most applicants will not have the capacity or expertise to proactively identify GHG emissions reduction or sequestration potential nor to develop and conduct the monitoring that would be required to track emissions impacts over time. If OWEB seeks high rigor for estimates of sequestration or avoided emissions or requires long-term monitoring, it will need to provide significant assistance both in application preparation and monitoring and tracking, either directly or through a third-party contractor. High-rigor estimates may not be realistic, especially for smaller projects; approaches that track practices known to cause carbon sequestration or emissions reduction may be more feasible than trying to measure these effects directly. σ
- Additional GHG tracking challenges: When quantifying carbon sequestration or other GHG reduction benefits, it will be critical to define the counterfactual against which the GHG reduction benefit from a project is determined. σ
- Another challenge is defining the appropriate time horizon for evaluating GHG reduction benefits. If OWEB requires project applicants to quantify the potential benefits (in terms of GHG reductions) from their projects, we encourage OWEB to develop clear guidance for applicants to help them determine the best methods for quantification that include counterfactuals and time bound estimates. σ
- How to transition to less fossil fuel use when tackling large restoration projects? Will need an approach to equally track and apply emission reduction strategies across projects statewide. σ
- Challenges include potential burden (time demands) and inconsistency among applicants / grantees on measuring / tracking / reporting emissions. It is important for OWEB to do this work to ensure consistency and reduce the burden on grantees. This is extremely complex and there are many assumptions built into reduction / sequestration estimates. σ
- Speaking from experience, quantifying carbon sequestration and emissions levels are both extremely technical and time consuming (one project could take weeks of work). Sequestration rates can widely vary species to species and even geography to geography (and approaches to quantifying within these individual species often vary greatly as well). Similarly, with emissions, quantifying emissions from one type of gas-powered bulldozer to another can vary. I see finding a way to standardize emissions reductions and carbon sequestration being a huge challenge, especially for small organizations with limited time and expertise. Spending more time on administrative work like this means less time and money going to the actual work that is helping with climate resiliency and adaptation. σ
- Applicants will need to understand how to build this into projects, including tracking and how to report outcomes. The funder should be flexible on this, as some applicants may already be doing this without calling it "greenhouse gas emissions reductions". σ
- Healthy watersheds equal healthy soils and vegetation quality, so there will be some soil carbon sequestration by improving land quality. Measurement of this might be hard – perhaps evaluating soil carbon and biomass in some of the successful restoration projects (e.g., those that have matured)? σ
- Having a way to address metrics is going to be important – a model or template is needed. σ

- There are multiple tools for estimating greenhouse gas emissions and there is the expensive route of validating them. Perhaps encourage grant applicants to seek out and utilize GHG quantification tools that work best for their project. [σ]
- It is hard to accurately account for without a timber crew, etc. [σ]
- Challenge of how to define and quantify these metrics [σ]
- Challenging to quantify greenhouse gas emissions [σ]

VI. Balancing Tradeoffs

- Large-scale projects (e.g., floodplain reconnection) are beneficial for long-term carbon sequestration and storage and providing resilient habitats, but these projects can be in highly degraded areas where a lot of dirt must be moved, resulting in significant emissions generated during project activities
    - There needs to be discussions around the tradeoffs (i.e., short-term carbon consequence for a long-term gain)
    - Big projects are necessary for climate resiliency; benefits far outweigh short-term carbon impact
- Smaller-scale projects may be at a disadvantage if looked at from a mitigation perspective (i.e., when considering emissions generated from project activities compared with longer-term sequestration benefits)
    - Smaller projects may not translate benefits well compared to larger projects with larger benefits
- What about projects with few opportunities to cut emissions (i.e., not many emissions to begin with)?
- Work already takes into consideration being as efficient as possible, carpooling when possible, etc.
- Will applicants who do not put a greenhouse gas reduction item into their project always have to be moving towards that, even though the project could be useful on its own? Someone might have a good project and then change it to fit a climate change mitigation standard, when it may not be necessary.
- Ability to sequester carbon varies per property (e.g., west-side forests vs. east-side grass/shrublands), which could disadvantage some properties
    - Ability to make impact comes from the type of land that gets conserved – this looks different throughout the state
- Easy practices (e.g., cover cropping) could be seen as a low hanging fruit because it is easy to implement, but could potentially distract from other project types that provide bigger carbon impacts
- Some project activities will release significant carbon (e.g., prescribed fire and/or fuels reduction projects, oak release projects); how do we balance tradeoffs and account for avoided emissions of projects (e.g., prescribed fire lessens chance of catastrophic wildfire, which would ultimately release more carbon)?
- Balance trade-offs: for example, for some larger scale restoration projects, there is a lot of earth moving and the emissions generated may be enormous in the beginning, but it may be worth the long-term mitigation and adaptation benefits
- Identify and clearly articulate the overall goal (e.g., is it to reduce the overall greenhouse gas emissions during the project implementation vs. offset?); if the

grantee is doing larger projects, consider the sequestration amounts that may work as an offset to emissions on the front end

- Some project types require the use of heavy equipment with no electric equipment or climate-smart manufactured material alternatives (e.g., culvert replacement project); how do we find alternatives and efficiencies while still getting the same ecological outcome (e.g., fish passage)?
    - In some projects, there's a certain size of equipment and/or materials that need to be used; for example, instream restoration work in sub-basins with volatile runoff conditions, the materials are sized to withstand certain flows
- Cost of projects, staff time, and loss of priority for restoration projects that have meaningful benefits unrelated to climate change; these projects are often small in scope and would provide unmeasurable/negligible benefits to climate-smart goals σ
- Not all environmental issues are the same. I am very grateful that OWEB helped us improve access to over 20 miles of fish bearing stream for listed Winter steelhead. In the future, will I need to find a way that something like this reduced greenhouse gas emissions? In a competitive grant environment this could mean that projects like ours won't get funded. σ
- Concerns around treaty rights and access to cultural harvests; for example, some concern that some culturally significant plants might fall under carbon sequestration umbrella and prevent Tribes from harvesting τ
- Relative importance of climate evaluation criteria: It is unclear how emissions reductions will be weighted relative to other evaluation criteria, and how this could affect the competitiveness of still necessary but less emissions-impactful projects. OWEB will need to strike a balance between helping projects optimize and track real, beneficial GHG emission impacts without detracting from the ecological project benefits it has always prioritized—and clearly communicate to applicants how this balance will affect OWEB's approach to project selection. σ
- Metrics could show a positive benefit in terms of emissions reductions, but the project ultimately may not be meaningful
    - Are we prioritizing the projects that make the most impactful change?
- To be competitive, do you need to show improvement? On carbon projects, it is based on change.
    - On properties that are doing great things, the movement may be small, because good management is already being implemented. How can we continue to reward stewards that are doing good things to continue to do so?
    - A lot of people assume their projects contribute to a significant "delta"; for instance, grass farmers think that they are storing a lot of carbon however, the science does not necessarily support that concept because of the cycles of tillage and other factors. This could inadvertently cause harm to applicants/grantees that cannot show that improvement in the delta.
- If eastside projects haul in electric tractors from the westside, it may negate any benefit from using electric equipment
- Quantifying short term emissions vs. long term benefits. Possible loss of interest by contractors or elevated cost associated with project implementation. σ
- COVID restrictions have eliminated carpooling options with federal and state partners

VII. Capacity

- Trying to figure out climate considerations initially will impact the pace of which we are able to get dollars on the ground
- This is more work to do for already-strapped folks
- Lack of capacity, funds, time, technical knowledge; these are new skills and applicants will need information, guidance, trainings/classes, and tools to respond to climate considerations and engage these new parameters
    - It could significantly increase the burden and make implementation more difficult
    - Inequities may be especially evident in rural organizations/projects
- Requires additional work in applications even though current work is already climate-focused
- Climate information is difficult to translate into a grant application; project managers are not (all) climate scientists
- Likely burden for small organizations; unless you are an organization with access to a research institution or funding, it will be difficult to do quantification
- How does this factor into equity between rural Oregon communities and the more urban areas?
- Inequities in capacity – some contractors cannot afford to upgrade to electric equipment; we would not want these projects to end because of equipment emissions
- I think my conservation district will be able to develop proposals that include the use of electric vehicles, chain saws, etc. The challenge is for conservation districts and watershed councils with limited funding, especially those in large rural counties with long transportation distances who might not be able to adapt to low emission equipment in an affordable way. σ
- This will be very difficult for many, especially in rural areas where financial resources are limited. Investment in building capacity to make this transition is critical. σ
- This will severely hinder project competitiveness and the ability of watersheds to work with local contractors. Small local contractors will not be able to afford to switch to greener machinery; this will cut out a lot contractors who are already trained in restoration implementation and drive the price of projects through the roof. σ
- Opportunities to play a role in climate change mitigation, but unrealistic expectations to assume all contractors, counties, and projects have the same access to resources that help them align with climate resolution requirements. σ

VIII. Other Comments

- Opportunity to work with large animal CAFOs to build digesters σ
- The Oregon Water Resources Department needs to be a partner, first to complete Integrated Water Resources Plan and enforce water use laws in watersheds. σ
- There is resistance to building any projects in Oregon. There is also too little energy to power the sustainable projects because terminating sources before alternative, cost effective, reliable sources are online. σ
- We can reduce these emissions by holding people accountable for pollution they create near our water systems σ

- GHG emissions occur whenever timber extraction occurs. Taking forest lands out of timber rotation reduces this rate of carbon emissions. The challenge is that the timber industry will not want lands to stay out of rotation for as long as is needed to maximize reductions of carbon emissions. Most remote forest lands, furthest from mills, with rough terrain, cause more emissions during extraction. These lands should be taken out of timber rotation to reduce emissions. σ
- The equipment that is needed for large projects runs on fossil fuel; "creative grant writing" will be encouraged with these requirements σ
- Investments in fish screens and diversions should consider reducing maintenance costs by integrating self-cleaning designs. Solar power generation should be integrated into projects. Construction generates emissions but proposals should be ranked on emission generation. σ
- There is an opportunity to change land use (e.g., pay for forest reserves) instead of funding channel changes with equipment σ
- Our work with fire resiliency, soil health and carbon sequestration should be beneficial σ
- Stream restoration through planting trees, conservation easements, and maintaining instream flows will increase carbon storage and reduce losses of carbon. However, challenges are focused on inefficient water consumption and overuse by agriculture and industry. σ
- This language, in conjunction with the Forest Accord, should provide opportunities for acquisition of timber industry properties where the industry's margin was already tight and the Forest Accord will further reduce the profitability. Coastal Oregon provides some of the fastest growing forests in the world, which, as a result sequester carbon faster. There should be an emphasis on acquisition of coastal forest lands to make the most 'meaningful' progress on carbon sequestration. Long-term investments in coastal range forests also will improve soil conditions where a high amount of carbon is sequestered. However, Forest Accord time scales may be too short to meet the 'long-term' sustainability of projects and acquisitions. It takes 80, 100, and more years for a forest to reach old-growth status, when its carbon sequestration will be the highest, which is a longer window than the Accord envisions. σ

2. What opportunities and challenges do you see with building climate-smart adaptation and resilience into your projects?

I. Quantification & Measuring Benefits

- We know these projects build resilience (e.g., store water) but the measuring of this is tough
- Measuring climate resilience and adaptation is a challenge σ
- We need good data and how to articulate the benefit of the climate work and monitor the impacts; monitoring is so important. We need a robust investment in pre- and post-monitoring so we can articulate the climate benefits of the work we are doing.
- Find ways to account for the work already being done across the state; focus on the on-the-ground work rather than spending time on admin of accounting for the work
- Projects vary widely – how do we analyze metrics to determine project success? And how will OWEB evaluate metrics?
- We assume in large measure that our projects are already going this; how do we quantify this, when comparing one project against another?
- A lot of benefits associated with existing work/projects (e.g., riparian enhancement, stream sinuosity restoration that involves riparian planting), including and beyond carbon capture – need to monitor this/might be fruitful area to explore τ
- It will be difficult to translate the definition of climate adaptation and resilience into measurable/trackable actions, and to provide examples/concepts or practices that are easy to understand. Metrics and practices should incentivize long-term resilience. Lack of expertise or capacity among applicants to identify and monitor adaptation and resilience in projects could limit proposed ideas and ability to follow through to ensure climate benefits materialize. σ
- A challenge is quantifying climate resiliency of restoration projects
- Not measurable and at what cost σ
- Access to accurate measurement methods of efficacy in reducing climate change impacts σ
- Restoration projects challenges include using alternative methods of implementation to complete the project. For example, only time will tell if plant species need to be changed to support temperature changes. I think restoration projects in and of themselves meet the goals of resilience. σ
- How does a person define project success from a climate perspective? Are there examples of that could serve as models? In some areas of the state, there be more interest in focusing on the co-benefits of climate-smart adaptation, water quality and quantity, vegetation quality, wildlife habitat, erosion control, etc. It would be helpful if these were recognized as part of climate adaptation. σ
- Challenging to define or measure climate adaptation or resilience σ

II. Expanding Climate-Smart Approaches

- Opportunity to re-examine potential project longevity. How long will our investments be valid? Climate is changing and changing rapidly. Is there longevity in the efforts we make now? Will they still be effective ten years into the future?
    - Opens up timeline and how we think about our projects
    - Look at what conditions and changes are expected in precipitation and snowpack - if you are already looking at these factors, your project will last longer; consider numbers of structures, sizes of culverts, possible replanting to adapt to future conditions.
- There may be a piece of a project you may not have pushed as hard beforehand, but it may be valuable in the long run to address it
- Opportunity to tweak projects even further to grow climate lens, become more efficient, etc.
- Process-based restoration (i.e., reconnecting floodplains, creating secondary channels, restoring stream processes with large wood)
    - Expands the opportunity to build climate resiliency into Oregon communities
    - Opportunity for broader social engagement on how this affects everyone
    - Funding and encouraging practitioners to use a more holistic approach – the opportunity to be efficient in combining actions to restore a basin (example: removing conifers in an oak forest to help oak proliferate and fill streams with logs
- Waste management/energy: ton of opportunity here (e.g., waste energy plants; look at models from abroad)
- Opportunity to build climate-resilient infrastructure, include drought-tolerant species in planting plans (although challenge may be cost to include these species)
- Opportunity to work with new landowners, across-the-fence conversations: is there a way to create a path to impact the conversation?
- Promote soil health (e.g., cover cropping) and riparian plantings in agriculture
- When planning projects, extremes now need to be planned for. We cannot rely on the 'norm' or 'historical' data when there may be fluctuating data (e.g., in water levels, droughts, etc.); this can be a hindrance to culvert replacement and other projects when the period of record is outdated.
- Current projects are integrated already, but it is ok to think of this as a new tool to consider (i.e., critical thinking to enhance projects is fine) [T]
- Majority of people are thinking about climate when applying for OWEB grants, but this might incent people to think of new ways/think outside the box on the work they do (i.e., connecting the dots in new ways) [T]
- Look for ways to align with ODFW priorities (i.e., similar to FIP). For example, habitat prioritization information from ODFW could be used during both grant review and for interagency collaboration.

III. Funding/Incentives

- Funding much of the projects already occurring; additional opportunities for funding?

- When EQIP began in the '90s, one of the rules was to have riparian buffers along perennial streams and filter strips along intermittent streams. NRCS got a lot of flak on these requirements and shifted to a ranking "point system". This worked out well because neighbors vs. neighbors began to shift the conversation. This could be a method for OWEB to incentivize climate-smart practices.
- Build new opportunities (with funding) for landowners to further develop their projects to be more climate-smart
- ODFW has additional funding for drought resilience projects; this may be an added funding source for projects aimed at being climate-smart
- From the private landowner perspective/transactional piece, if this is required, will the landowner be compensated for these actions for the long term?
- Small grant for outreach is important to tell the stories
- Effectiveness monitoring has made a difference in the limited areas OWEB has been able to invest
- Change focus of project; for example, not just fish related, which may be an opportunity to access funding for many more projects
- Tactics, whether repeated or brand new, do not collect much data on success (i.e., monitoring funding very hard to get), so providing funds to retrieve these metrics and share results could make continued, sustained change
- Grant credit to projects already doing adaptation/resilience work (e.g., planting drought-tolerant plant species; changes in project implementation to address earlier peak flows/stream runoff)
- OWEB funding could be better leveraged to increase resilience of Oregon watersheds and landscapes to climate change. Many organizations, including TNC, are already considering climate adaptation and resilience for future restoration and protection projects, and a great deal of high-quality restoration work is already happening in our state. OWEB funding could provide an opportunity to push more projects to fully incorporate climate-smart adaptation and resilience. There may also be opportunities to align evaluation criteria or guidance with federal funding programs also defining or requiring consideration of climate adaptation and resilience. σ
- There is an opportunity to prioritize type and location of projects that lead to valuable long-term climate resiliency σ
- Restoring or enhancing green infrastructure is a big need and opportunity along the south coast. However, that can often mean larger price tags on project components which, in a grant, can be difficult to find funding for. σ
- Opportunities include OWEB's opportunity to create new funding sources to support community engagement in new ways and to provide financial support (or partner with another funder who can) to incentivize some transitions to cleaner equipment where it exists. σ
- Our projects focus on fish habitat restoration. Climate impacts should be defined for such projects in order to prioritize which projects will be more successful in a changing climate. For example, where will cooler water temperatures exist in the future to construct such projects that may last 20 - 40 years. This can only be known

by also funding those data acquisition studies that will determine current water temperatures and then extrapolated to how those temperatures may change in the future. σ

- Provide direct resources/funds to partners for capacity-building for water-related projects (e.g., acquisitions)
- Consider creating a climate FIP
- Create grant funding opportunities that help explore the adaptation and mitigation benefits from grantees' existing or emerging work, or work that may be important in the future (e.g., monitoring and research funding to understand the possible climate benefits of floodplain restoration work - for example, does restoration improve alluvial aquifer storage, helping cool the creek in a warming climate?)

IV. Education & Outreach

- Many projects often already do this; can we make an intentional effort to communicate that to landowners or partners with the projects?
    - Depending on the community you are working with, it can help people understand why you need the project done
- Consider the types of restoration efforts that OWEB can fund, and walk a balance between adaptation/resilience and opportunities for mitigation
    - We can thrive in supporting adaptation/resilience and tracking mitigation
    - Mitigation needs to be thought of, but where we need to focus is getting conservation and restoration work done
- It's important for all projects to take a climate change lens, however, the reality is that it will be very difficult for many across the state to reduce carbon footprint of restoration projects without an investment to provide the capacity to do so. Projects that specifically highlight climate adaptation and resilience of watersheds should be high priority. Challenges exist on deciding what the best climate adaptation and resilience solutions are, but that is always a part of the process. σ
- State agencies can work to their own strengths (e.g., ODOT is able to do far more with reducing greenhouse gases, while OWEB could focus on restoration)
- Increase the conversation about adaptation, specific to things like aquatic-related projects and being able to handle floods (e.g., project will last >30 years)
- For land trusts, focus on resilience is at the forefront (e.g., using TNC's datasets) which drives land protection decisions
    - An opportunity for land trusts is protecting lands and "holding the door open" to implement climate-smart projects/actions
- We have been doing restoration work for 25+ years, trying to address climate change the whole time. An opportunity is to build a shared understanding of what "climate-smart" means and share that widely throughout the state.
- Recognize the work that grantees are already doing is helping to mitigate and adapt to climate change and improve watershed resilience
- Change is hard – how do we present the change to partners in a way that gets buy in and does not feel rushed?

- Provide standardized trainings for habitat restoration practitioners (e.g., site preparation, guidelines to begin these practices with climate-smart lens)
- Increase communication amongst landowners and adjacent sites
- Not everyone understands the terminology. What do these terms mean?
- Need to improve understanding and have training on what these topics are and how to build them into projects, including how to monitor and track changes as well as report outcomes σ
- An opportunity for education to the key partners on projects σ
- Riparian and floodplain restoration is already a form of climate-smart adaptation σ
- Knowledge gaps in what this means and how to implement it on the ground. σ
- Challenge to bring stakeholders/landowners along with longer term goals and solutions σ

V. Capacity

- Not enough contractors to go around
- Limited time to implement work
- Training needs
- Shrinking capacity of our partnering organizations, but we need their technical expertise
- Climate data is harder to access
- Need more monitoring
- Less experts
- Assessing issues at-hand creates a burden for field teams
- Access to needed data and data management systems to support the work
- Choosing which project elements to implement takes time and money. For example, project design around sea level rise requires high-level hydrological monitoring (which drives cost way up) and thinking about climate change impacts 10/50/100 years into the future (increases time because of integrating all considerations into project design).
- We have already been building climate adaptation and resilience into our projects for years. Challenges include layering on more requirements on good work already being done (when most folks were already considering climate change in their work), and the burdens on small restoration organizations and contractor outfits without associated incentives, support, or financial resources. σ
- Some watershed councils/soil and water conservation districts are very small and do not have all of the necessary “oligists” on staff.
    - Needs to be assistance and support for implementors to be able to articulate the benefits of the work we are doing for climate resiliency (we are doing it, but not all organizations are on equal footing to be able to articulate the benefits of the work we are doing)
    - Big gap in understanding and monitoring

- A lot of the projects that OWEB already funds help to address climate mitigation and adaptation work. Increasing administration required on both the front and back end of projects means less funding going to actual climate-smart adaptation and resilience work. σ
- Concerns about added workload; having technical assistance available would be helpful. σ

VI. Applications & Evaluation Criteria

- Have guidance from OWEB on how adaptations should be used, so if this is a big ranking factor, grantees can address it better
- Provide the tools to measure effectiveness – there are a lot of mapping, analysis, and ranking processes, which are not accessible for everyone
- Cannot see how a climate change lens would change project design (because folks already do this)
- Can OWEB list climate-change focus options that applicants can click on/off for a project? This would reduce the amount of additional work for applicants.
- What kind of criteria makes a project "climate-smart"? Will a detailed rubric be provided for applicant projects? Much of what OWEB does already promotes resilience, because naturally functioning systems are more resilient than engineered ones. σ
- Applicants must learn new language to write better applications
- Risk of encouraging folks to change language of application rather than how projects are completed
- Confusion as to whether OWEB prefers certain adaptation/resilience practices over others – can OWEB create a form outlining this?
- Already have 15-20 lenses when evaluating projects, and many of these seem to already consider climate
    - How does added lens change the evaluative process?
    - Extremely expensive to model/calculate real-time climate benefits
    - Can this be as simple as possible? Can it expect errors? Can it anticipate differences in ability to quantify across locations around Oregon?
    - Will need to enhance the current (unsatisfactory) tools that are available
- Applicants doing these projects already – does this turn more into a paper exercise?
- A project that is important from a climate adaptation standpoint may not be reducing greenhouse gases (even if it is important, it may be a net carbon output)
    - How do we look at projects this way, but not shy away from funding important projects because of a 'greenhouse gas cap' over the life cycle of the project?
    - Should not take one component of our goals and have it over-shadow other benefits
- On restoration projects, we may be focusing on building in functionality, but at the same time it is also building in resilience. It feels like it may be smuggling in climate change conversation into projects.

- OWEB develops a list of activities to include in grant applications that could fulfill the mitigation/adaptation requirements
- Do we know how these considerations for climate will be graded or is there a point system?
- There is a question of how much additional work providing adaptation and resilience information in project applications will take, on top of an already very time-intensive application process. σ
- Challenges include accessing current science (OWEB should think about how it can play a role in providing resources to grantees), how will OWEB determine what projects meet these guidelines and how will it implement these guidelines, particularly with management (i.e., will OWEB ask us to eradicate all weeds?), what support will OWEB offer in helping grantees and applicants implement projects that increase climate resilience and reduce GHG emissions? What does this resolution practically mean for applications and implementation? σ
- Oregon is a large state with very different geographic regions, and the criteria for incorporating climate considerations into grant applications needs to take these differences into account. There should be examples of practices and management measures that work in different regions (e.g., a how-to manual as well as things not to do). σ
- Creating additional work for applicants if they/we have to guess what OWEB views as climate-smart adaptation and resilience. Be clear about definitions and expectations of applicants, as well as of OWEB. What do you hope to achieve within the next 5/10/20 years? σ
- Cost of projects and staff time, and a loss of priority for restoration projects that have meaningful benefits unrelated to climate change; these projects are often small in scope and would provide unmeasurable/negligible benefits to climate-smart goals σ
- There are benefits to building climate resilience into projects, but to base funding projects on their climate resilience would hinder the small project competitiveness with large projects σ
- Challenge to prove the data used for your decisions supporting or denying funding is valid σ
- Concerns around demonstrating mitigation on top of already meeting climate adaptation and resilience. How do you weight the mitigation vs. climate adaptation/resilience and current conservation/restoration focus? Try not to make requirements more burdensome than they already are.
- OWEB should invest in working with experts to understand what are the most meaningful ways that grantees are already providing climate adaptation and mitigation benefits and include those as “boxes to check” on grant applications and perhaps also request basic information (e.g., acres of floodplain restored, # of native trees planted, etc.) so that mitigation and adaptation benefits can be calculated (by OWEB staff or consultants). These “boxes to check” could be the specific metrics determined by experts and identified by OWEB staff to represent climate benefits of OWEB-funded ecological restoration, similar to the specific metrics grantees are

required to report on in OWRI for stream habitat restoration and PCSRF funding reporting.

VII. Other Comments

- What is the crux point? Is it supporting contractors to work across multiple organizations? Think about how the FIP investment catalyzes this.
- Is the onus on the local organizations to get the word out to construction entities? What specifically do they need to address in their bids/what is it we want them to highlight in their proposals? Do individual organizations define it, or does OWEB define it? Prefer if OWEB defines these parameters and spreads this message out to bidders.
- Terrestrial barriers, wildlife unfriendly fencing should also be included as examples of adaptation/resilience
- It is easy to think of greenhouse gas in the mitigation circle, but it can get difficult to talk about the adaptation circle because it may be difficult to put a carbon value in removing a fish-passage barrier or rebuilding a culvert
- Potential conflicts of interest (e.g., Army Corps of Engineers removing willows to plant alfalfa)
- Ecosystem conflicts (e.g., otters acting like invasives)
- Is some of this work in vain? For example, building bridges/culverts, disrupting landscapes, without any water.
- Consider how OWEB's work links with the work that Cathy McDonald is doing ᵀ
- Matt Donegan working with ODF/Wildfire Response Council around carbon may be good to get in touch with ᵀ
- Climate-smart adaptation and resilience have always been a central focus of PFT's work, and we do not anticipate any significant changes to our project development process were OWEB to incorporate new climate-based grant application criteria. New criteria that address resilience are key to ensuring that all the benefits of a conservation project are ensured for the long term. ᵟ
- You need the climate-smart approach to include biodiversity; this includes a Habitat and Biodiversity Valuing System (that was proposed to OWEB over 5-years ago, as CHAP - Combined Habitat Assessment Protocols by The Habitat Institute). This also needs to include Key Ecological Functions to determine resiliency and for trade-off analysis. ᵟ
- I find this very concerning. OWEB is already doing positive environmental work. It is a rare funding source for this kind of work. To place additional restrictions or hurdles to environmental work is ridiculous. ᵟ
- Working with the vulnerable and socially disadvantaged society that are most impacted by climate ᵟ
- An opportunity to address systemic issues that perpetuate climate-damaging processes. The challenge is that changing a system is more difficult that changing individual pieces. ᵟ
- Climate change is not concerning for it is not happening at the rate described in this survey. I feel as the request for fictitious funds is a waste of community resources. I

fully support watershed and fish conservation, but there are great issues at hand when it comes to our water and wildlife. σ

- The biggest challenge is lack of uniform and consistent guidance from OWEB or the State. It's great to move in this direction, but without a more thoughtful and comprehensive approach, it seems like we are setting ourselves up for frustration, disappointment, and failure. σ
- We are addressing this strongly in our update of our Strategic Plan. Additionally, much or the work we already do is aligned with climate-smart adaptation and resilience. σ
- Most of our projects are to improve instream salmon habitat; we don't see many opportunities to incorporate meaningful adaptations into our projects. σ

3. What can OWEB do to help current and prospective grantees build climate considerations, such as impacts, adaptation, and mitigation, into their projects?

I. Funding/Incentives

- Provide incentives for process-based restoration, with OWEB covering the difference in transitions to more responsible equipment
- Have some sort of mechanism or funding tool that can help support contractors in shifting to electric or low emissions equipment; in the restoration economy, finding ways to help partners (including contractors) to make this change (e.g., subsidizing)
- Be flexible in funding and take into account new solutions and ideas to address problems we are facing; Tribes have been on the land since time immemorial and see the landscape differently [T]
- Identify and support opportunities to assist with tribal capacity building [T]
- Provide funding for increasing capacity, tool exchange, and/or new mitigation-based actions; many grantees are already operating at max capacity and need incentives/funding to address new considerations
- Provide financial incentives to private landowners to build climate-smart actions into their operations
- Provide more technical and/or monetary support to get grant applications done, especially for smaller councils
- Find ways to leverage additional sources of funding, or additional initiatives to gather more interest and involvement
- Provide resources and incentives for local businesses/contractors.
    - Electric equipment is a great idea, but many folks cannot afford to upgrade; if we are encouraging folks from other areas to commute to project, is that really a positive?
    - Incentives to adopt new technologies; for example, create a grant program to make initial investment in a transition to electric equipment
- Forgiveness on the cost side
    - Carbon projects add cost (increased monitoring, metrics, etc.)
    - "Should not be a negative on lower cost/benefit or lower return on investment"
- Provide time (trainings) and money (to attend trainings or purchase equipment) to add capacity and resources to organizations
- Provide incentives/resources (financial) to smaller organizations to help transition to electric vehicles/equipment, as larger organizations have opportunities to have these already
- Offer flexibility with community engagement funds
- Allow carbon offset funding to match state funding [σ]
- Work with tribes and increase funds for BIPOC organizations and organizations working with diverse communities to address climate, food insecurities, wildfire hazards, sea level rise, etc. [σ]

- If you want to encourage moving away from climate-damaging practices or systems, OWEB must be flexible in their funding to address systems and processes, even if those systems and processes are only tangentially related to a project being funded. For instance, if OWEB wants me to move away from greenhouse gas emitting vehicles, OWEB must be willing to fund more than just the portion of replacement costs related to a specific OWEB-funded project. I may not be able to afford to replace my fleet if OWEB only funds the 5% of the time they are used for a specific OWEB-funded project. Also, OWEB can encourage including funding for studying the long-term effects of climate change on watersheds, and how landowners and stakeholders might begin now to make changes. Unfunded mandates will not be helpful. [σ]
- Data is important. Provide extra funds to ensure a significant number of projects track, over a long term, stream quality, groundwater and soil moisture, and above- and below-ground carbon sequestration so that we are able to accumulate long-term data. [σ]

II. Tools

- Provide a calculator or tool to quantify carbon emissions/sequestration metrics and analyze projects, helping ease the burden off the applicant to do this new work to apply
    - Help practitioners calculate the carbon intensity of different activities (applicants would certainly use it if it was tied to funding requirements)
    - Provide a variety of calculators representing different landscapes of Oregon
    - It is inefficient to have each applicant hire a consultant to create a tool; perhaps OWEB could collaborate with other agencies (NRCS, ODA, or others) to standardize the measurement tool
    - Look at TNC Resilient Lands Mapping Tool and others
    - Identify and/or create cross-agency tool(s) that are applicable to multiple organizations (OWEB/NRCS/ODA)
- Take into consideration long-term carbon offsets of projects (not just one year out, but 10+ and accounting for expected species mortality rates) and not emissions alone or trees planted over the course of the project alone [σ]
- Create a carbon calculator, which could be a spreadsheet that calculates the various carbon reduction practices; it would be nice if the calculator could be used for applicants so they know how their funding proposal would be evaluated [τ]
- Develop a list/catalog of practices and potential climate benefits to inform project development
    - How is OWEB valuing practices differently given mitigation/adaptation benefits? How to quantify benefits and monitor over time?
- Develop a list of OWEB-prioritized practices, from most highly valued to least
    - Give grantees ideas/resources of practices and link with co-benefits
- Provide simple, concise tools and resources to make it easy for applicants to understand what climate considerations relate to or could be incorporated into their projects. There may be a trade-off where either OWEB requires rigorous assessments

of climate benefits for proposals and provides support to grantees, or OWEB requires relatively simplistic assessments of climate benefits for proposals (but loses out on rigor or accuracy). If high rigor is desired, OWEB should take on responsibility for detailed emissions or other analysis and long-term monitoring and tracking—either directly or via a third party. If OWEB is not able to take responsibility for long-term monitoring and tracking, grants should include adequate monitoring funds so that applicants do not need to seek additional funds or go through the OWEB application progress again to tap monitoring dollars. [σ]

III. Education & Resources

- Transitions to climate-conscious equipment and techniques "will garner more support as we show the changes we make and the progress we can still achieve"
    - Many projects are already mitigating for climate change and as we learn more about how to quantify this, grantees will be empowered and projects will become more compelling to OWEB and other funders
- Continue to provide opportunities for dialogs and be open to helping each region and grantees implement the climate considerations within their projects
    - Not each region and its members have the infrastructure so continuing to evolve what we can implement into our projects and having the understanding that the process may be slower
    - Continue to have listening sessions to get input across the state
    - Start a little bit slower
- Provide resources to grantees to support their effective and efficient use of climate data metrics and monitoring protocols
- Provide education and outreach tools; for example, a portal to tools in one place for applicants [τ]
- A lot of data exists, so not sure new data collection is necessary – the challenge is finding the data and using it; consider supporting technical assistance proposal efforts to help groups identify and use the data
- When OWEB starts using climate as evaluative questions, training will be needed for those writing the grants as to what is expected
    - Education for newer grant writers
    - Assistance/education for grantees to better understand what OWEB expects in applications re: climate change questions
    - Technical support to meet climate criteria (e.g., from OSU Extension; non-profits with staff scientists), particularly to help groups without these experts or that lack access to their staff
    - Will need to strike a balance for how to keep the playing field level (e.g., smaller entities could be at a competitive disadvantage to larger entities that can pull a climate change specialist onto their staff); can OWEB provide a bridge to specialists?
- Gather resources and create a clearinghouse of links where people can find resources on monitoring, grant writing, and how to respond to climate questions
- Pool and share information for others to adapt into their projects

- Develop resources to help partners identify what and where climate-smart opportunities exist
- Provide links to climate information that is specific to watersheds and project site(s) to reduce the amount of time and effort applicants take to try to track that information down [T]
- Some current data is broad (wetlands/storage sequester carbon); specific case studies could be beneficial to help articulate benefits
- Training on the climate resources that are available
- Trainings to build staff capacity so that staff have the ability to recognize and integrate climate-related opportunities into programs [T]
- Education and tools to understand climate impacts
    - A huge component is education for people on the ground who are coming up with mitigation and adaptation ideas. Many times, these come from natural resource partnerships, but not always. Could OWEB fund educational resources for grantees?
- Spread knowledge and provide education around practices and success/failures
    - Share success stories and good ideas so hesitant folks can learn and build in adaptation/mitigation aspects into their projects
    - Share failures and lessons learned
- Provide education around opportunities to transition, payoffs, etc. for local businesses/contractors
- Does climate action mean doubling down on what we do or, alternatively, how would we change to deepen the investment? What can we change in what we do?
    - It may be important to understand our current carbon storage/sequestration in our existing work before we make changes that will negate benefits we are already creating
- Evaluate different planting methods and timeframes (i.e., project implementation vs. project at a future point); difficult to quantify short-term/long-term benefits with different methods (e.g., R3 method vs. others)
- Encourage innovation in grant-making process
- Provide more resources (financial, educational opportunities, scientific research) to help us build these considerations into our projects and organizational operations. [O]
- Support industry advancements; help on a state level to make resources more available for us in contracting, etc. so that it is not so hard for us to find eco-friendly contractors. [O]
- Early interactions with grantees to educate on how they can assist with building climate-smart adaptations or emissions reductions [O]
- Provide training and examples, technical assistance, and engagement at the project level, and leverage resources from other agencies and partners into projects such as scientists, NRCS and SWCDs, ODFW, OWRD. etc. [O]
- Training, education, flexibility in dates and other grant rules, flexibility in definitions [O]
- Be a resource center for best practices, availability of new tools & equipment that reduce emissions in projects [O]
- Provide clear definitions of concepts [O]

- Provide comprehensive list of BMPs for a variety of projects that OWEB feels support this mission; we can use these as appropriate in our applications, project planning, and contracts with project contractors σ
- Identify climate resilient solutions that grantees can consider/implement that would be favorable to decision makers when assessing projects for OWEB investment σ
- Support basin-wide planning and modeling σ
- Help fund those studies that will provide information on how water temperatures will change in the future, but done on a basin-wide scale to determine which areas hold the most promise to be successful with public monies σ
- Develop ranking systems that emphasize carbon sequestration and emissions reduction σ
- OWEB might categorize potential adaptations that might be incorporated into various project categories σ
- Provide examples of successful projects that improve climate σ
- Provide a lot more meaningful and concise guidance on what you are seeking in each area, with examples, and reality checks (costs) built in σ
- We must provide quality resources for Oregon contractors to "switch" to climate-friendly practices and equipment. It would be critical to set long-term deadlines for contractors. It is unrealistic to assume all contractors can operate under climate resolution requirements immediately. They must be supported by resources and training that allow them to align with climate resolution requirements. σ
- Inform regional review teams about these issues and potential solutions so that they are recognized and accounted for in proposals σ
- Make sure that what is in your resolution is made available to grantees in the application process, but is also available to grantees in a form that can be utilized with our constituents σ
- Find ways to support engagement – open, honest engagement without pre-determined outcomes. OHA had a great funding announcement earlier in 2022 that (in part) supported climate change and community engagement work. Could OWEB partner with OHA to support more of that kind of funding and work and learn from the DEI perspectives OHA included in their grant-making? That would be great! σ
- Either build out a resource center for consulting/guidance for transitioning grantees or collaborate with an existing organization to do this. Pay organizations so their staff and relevant partners can participate in these processes. Provide grants to build this capacity and set transitional long-term targets. For example, provide grants to watershed councils that will work with small business contractors that make below some annual revenue to upgrade their equipment that uses less fossil fuels. σ
- OWEB should consider providing tools and resources to grantees, and should standardize any approach σ
- Clearly define expectations and provide guidance/resources to quantify climate considerations σ

- Provide a list of possible methods for observing climate change metrics that have been adequately reviewed. Provide basic information in how it could be accomplished and additional funding to support σ
- OWEB should consider what grantees have been doing already to build in climate considerations into our work (i.e., take stock of the current situation) σ
- Make sure to acknowledge the work that has already been happening and that even if we do not use the language that our work is still important and relevant σ

IV. Application Changes & Evaluations

- Identify ways to streamline the application process without losing details (e.g., can we replace paragraphs with check boxes?)
    - This could simplify and standardize the information grantees provide
    - Develop a calculation tool that applicants could use; it would require some testing (e.g., because some projects can seem similar but have considerable variables or other factors that need to be differentiated)
- Clarify application process
- Identify ways to simplify questions/responses regarding climate considerations
    - Most projects have climate-smart actions – how can we formulate grant applications/questions that do not add to the already complex nature of the application
    - Is it just another analysis on top of projects? This is more work for limited capacity, so please make this as minimal as possible in the application process
- Provide guidance to grantees and applicants to make responses to climate considerations consistent
- In the restoration program, grantees can reference and build in the nested data (example: fish species) to help meet some of the considerations
- Clarify what OWEB's priorities are when grantees are submitting projects; for example, do they make the tie to climate change, will other projects be stronger because they have a stronger outcome?
    - What lens is OWEB going to look at projects through?
    - In the adaptation world, what you are doing may not be different, but the extra thought or consideration for how it affects climate change may be needed. Will projects be ranked higher depending on immediate mitigation vs. long-term/high-level climate mitigation/adaptation benefits?
- Clarify whether responses are quantitative or qualitative, or both; recognize that some projects lend themselves better to one or the other
- Identify/clarify what type of data/models to use to demonstrate that projects have climate-smart impacts; the message from OWEB needs to be consistent and commensurate with our evaluation criteria upon which applicants are evaluated
    - Tools (not just resources) are needed upfront; applicants need something (OWEB-generated) that will suffice for responding to questions
    - Provide suggestions for specific strategies, on a project basis, on how to combine goals for restoration/climate mitigation

    - Create a cheat sheet on quantification of project's value to guide grantees in the process; some standardization will be needed, especially for reporting purposes
- Have climate questions include examples to help grant applicants understand what OWEB is looking for in responses
    - Share the responses from the climate questions.
    - Share what grants were approved and why (and which were not and why)
- Think region by region and how goals and priorities may be different (e.g., things on the westside might not be as applicable on eastside); guidelines and solutions should fit the region [τ]
- Realize that it is difficult to quantify climate benefits and ask applicants to track carbon sequestration over the years; risk of people not applying if this is too difficult [τ]
- Because implementors are already doing these things (e.g., grazing management plans, planning of ideas or list of things to be done in project), make sure the point system or evaluation criteria is clear enough for regional review team members
- Establish scoring metrics; OWEB could build a simple tool (or make available to grantees an existing tool) and/or work with a true expert on this topic
    - Would appreciate guidance from someone with expertise to look at the best ways to address climate mitigation and adaptation
- Consider slowing down the process; for example, let applicants take considerations for a 'test-drive' before putting solid rules into place
- Identify ways to align grant programs and allow flexibility around matching, and consider ways to standardize grantees' language so they can also apply for federal funding (i.e., because increased federal funding is becoming available)
- We support the climate resolution and encourage OWEB to implement new climate-focused criteria into the grant application process. Simply adding these criteria will encourage applicants to rethink their projects in a climate-smart framework and identify potential areas for improvement. These criteria ought to be more directional than quantitative–promoting sequestration and resilience by moving landscapes towards more natural structure, composition, and function. To help this, OWEB could create template language to put into conservation easements that achieves meaningful improvements to forest condition while maintaining the flexibility necessary in a permanent agreement. This is a process PFT would be happy to offer further input on. [σ]
- Streamline the application process overall, including how climate considerations are incorporated. The current process includes elements that seem, from an applicant's perspective, to be unduly burdensome, and simply adding climate onto an already difficult process may turn prospective grantees away. If there is an opportunity to adjust other aspects of the application process while working to incorporate climate, this would be greatly appreciated. [σ]
- Make climate impacts a consideration (project evaluation criteria) but not a requirement for projects. Offer clear guidance on how climate considerations should be addressed in applications and grant reporting. Offer clear guidance on whether OWEB is requiring clear climate objectives (applicant will sequester X tons of carbon) or just considerations. [σ]

- Only use climate change to evaluate projects in the most minor way possible (not the driver of conservation work) σ
- Be patient – this is a new thing that will take some getting used to; provide a reasonable time frame for all grantees and practitioners to adjust to new approach σ
- Focus on greenhouse gases allows for greenwashing initiatives to massage calculations in their favor; in what way is OWEB going to hold project recipients to these goals without sacrificing the intent of its mission? σ
- Emphasize the co-benefits to the affected communities and landowners σ

V. Other Comments

- Prioritize vulnerable communities that will be impacted most by climate change
- Tribal stewardship is inherently climate resilient because First Foods have survived natural changes in climate for millennia; many carbon crediting schemes are known to reduce tribal treaty rights access in favor of "carbon sequestration," how is OWEB going to ensure projects are prioritizing Indigenous access to treaty rights above carbon calculating? How is OWEB going to uplift the voices of Indigenous stewards in their project planning, proposal evaluation, and granting process? σ
- It has taken two years to get to a climate resolution—which feels like a long time
- There are other benefits outside of climate mitigation for exchanging tools and equipment (e.g., safety, noise pollution)
- Potential for climate resolution to have some unintended consequences of reducing equity in how grant funds distributed
    - What happens to Mom & Pop shops and how will they be competitive?
    - Adaptability of what the future holds and how to bring smaller organizations/contractors along?
    - Factor in inequities in grantees/contractors' ability to upgrade equipment
- Monitoring is always underfunded, and this will require it – what kind of monitoring will be expected long-term? τ
- We support OWEB in taking climate action beyond the position of "everything we do, and have always done, is climate action." This means providing an investment framework for Natural Climate Solutions that provide the greatest carbon reduction for Oregon. I would like to see OWEB incorporate the Oregon study produced by Dr. Graves at TNC that highlights these pathways. We believe that natural climate solutions begin with protecting our land base and that this should be done with deeper investment in land acquisition by land trusts, tribes, and other eligible entities. The Resilient Lands Initiative that Oregon Community Foundation is now running is a great example of an investment framework based on TNC's Conserving Nature's Stage data. σ
- The Habitat Institute has recommended in the past and again now to setup a statewide Habitat and Biodiversity (HAB) Valuing System for use by all projects. This is similar to what the Pacific Northwest Power and Conservation Council did for subbasin plans from 2004-2012. HAB Valuing System uses the CHAP approach that has undergone Independent Scientific Review and a National Academy of Sciences

review process. But OWEB's prior staff has been unwilling to even recognize it. By the way, the approach was used by ODFW to obtain a $150 million dollar settlement from BPA, which was the foundation for the Willamette Valley Wildlife Mitigation program. σ

- To have a significant impact on climate change, OWEB will need to state unequivocally that there will be a shift in projects that are funded. This is not to say that climate should be the only criterion for funding, but it must be a heavily weighted criterion. In my opinion, it would be a mistake for OWEB to try to appease all interests by watering down the emphasis it puts on climate considerations. OWEB should be clear that some project proposals that recently were highly ranked for funding may no longer be funded because they have negative climate impacts. OWEB is doing the right thing with this resolution, and it must stand firm in ensuring it results in significant climate-smart projects. σ
- Go slowly. The whole point of watershed councils and local restoration groups is that we convene local stakeholders and determine shared problems and priorities. We have plans – action plans, strategic plans, monitoring plans, etc. – that have taken significant engagement and investment to develop. Things do not (and should not) turn on a dime because a funder demands it. Support grantees updating their plans to incorporate a climate lens in their own work but be considerate of the predicament of many local groups working with stakeholders who feel climate change is a political topic and may not want to engage. We may need to talk about drought, fire risk, etc. and not use the phrase "climate change" specifically. Be understanding and accepting of that nuance. σ
- More water conservation projects are needed – projects that help promote keeping the water on the landscape longer, actions that mitigate and adapt for the flooding and drought cycles we are seeing, and planting species that can tolerate a wider range of conditions σ
- Give preference to long-term protection of forests, which allows them to reach old-growth status. Carbon sequestration increases, on average, as a forest matures, as does protection of the soil, groundwater, stream quality, and resilience. Taking them out of timber rotation is the best way to maximize these benefits. σ
- Mitigation acts to reduce or prevent the impacts from occurring therefore, emphasis/preference should be first on mitigation, then, if necessary, adaptation. σ
- Forests that are complex and diverse in both structure and species tend to be more resistant and resilient to short- and long-term weather and climate impacts. Projects should emphasize forest complexity and diversity. σ
- Hold people accountable for their pollution along with dumping waste, receding high water lines, and building on sacred land that is stolen from the people and clear cut σ
- Get support from other agencies and authorities having jurisdiction to quit piling on fees and non-regulatory building requirements for projects σ

4. What's one important thing that OWEB needs to know as they think about rulemaking to include climate-focused evaluation criteria in grant making?

I. Capacity & Equity

- Different entities have different capabilities:
    - One rule may not be the solution for every area; think about rural/remote rural vs. urban communities and the resources available
    - Recognize that the changes may not be as fast as others
- Range in capacity varies organization-to-organization (inequity); capacity for additional work/writing/learning could benefit certain folks and harm others
- We often are trying to do everything we can to be more efficient and have worked for years to increase climate resiliency. To do more, the thing that could help the most is additional resources and capacity. σ
- Remember capacity is an issue. Asking non-profits to address the natural resource, social, climate, and economic issues is a lot to ask for a 1- or 2-person organization. Provide more agency support and or base capacity funding. σ
- We do not have a lot of discretionary money to spend on proposal writing; help with that would really incentivize OWEB project applications σ
- We are a small nonprofit that manages lands, with limited resources and capacity. Rules should be tied to funding to accomplish the work dictated by the rule σ
- As a watershed council we are a small group, with limited funding and staff, working on small projects that, even if we build these into our projects, the benefits would not be measurable and negligible σ
- Watershed councils in the more rural areas of the state may be disproportionately excluded from funding σ
- Ensure equity – how can this be equitable across the state? τ
- Consider seriously how to avoid penalizing small groups, rural groups (larger area, more driving, less resources, often more conservative stakeholders, fewer contractor options, etc.) with these criteria. σ
- Inequity to achieve standards (specific ones that cost money to receive) in environmental management
- Equity may impact peoples' abilities to address these new guidelines
- A learning period would benefit grantees – to better adjust to new changes and allow OWEB to better address their grantees' capacity and bring about meaningful change
- Inequities and lack of capacity for many folks to make changes (or even attend these meetings)
- Think about equity around rulemaking
- Slow down. The speed at which change is being proposed in rules is too fast. Considering greenhouse gas emissions is great but moving too fast is going to end up hurting those we are trying to help.
- Regional considerations, specifically project design around climate change effects (e.g., sea level rise), takes more time (and much more money) to establish the right path forward

    - Climate-smart projects around community resilience require community input, which also takes time and money
- Money narratives are rapidly changing (i.e., inflation) and organizations are already pressed for funds trying to do their current projects. OWEB's expectations around budgets should be flexible when asking for more project considerations, more capacity.
- Capacity limitations
- If projects are going to be ranked on how much carbon they can sequester, it can pit projects against each other based on climate and where they are in the state. When we think about rulemaking, we need to consider how one area may look better on paper than another, with both being valuable.
- Resources to help organizations and contractors adapt (especially if you want entities to purchase and maintain electric vehicles as this is not something that small organizations could afford to front) σ
- Make sure any RAC associated with this resolution has diverse representation. σ
- Need to get a "watershed person" on the RAC

II. Applications, Evaluations, and Reporting

- Clarify how climate questions are weighted
    - How do we make it so that climate is not driving every application even if it is not what is really driving the projects? For example, applicants don't want to be phony in grant writing by inflating the importance of climate change or design projects to address the questions when it may not be appropriate.
- Every grant has gotten harder to apply for and has had increased reporting and requirements
    - There is value in extra reporting, but find a way to do this without creating additional hurdles
    - Could restrict grants for underprivileged areas
- Make sure that changes in the application are easier to write and make it easier to review, and continue to train users on the grant application to improve understanding
- Provide a calculator – it is important to make the calculation simple and accurate, truly reflecting the change
- Developing a calculator could be an OWEB grant in itself; if so, it should involve a consortium of agencies and organizations who work together to develop and continually refine a calculator that is reasonably simple, accurate, and consistent. σ
- Make tools available to applicants to easily use in developing projects τ
- Qualitative and quantitative criteria should be broad, allowing people to think outside the box to get to goals in unexpected ways (i.e., avoid placing strict sideboards on the types of projects that could be funded because the umbrella of adaptation/resilience can be broad) τ
- OWEB should be conscious of the long-term time horizon that we need to create, grow, and maintain benefits on the landscape through management generating more natural conditions. New application criteria should therefore prioritize projects with durable, enforceable terms that promote management towards more naturally

carbon-rich and climate resilient landscapes that support Oregon's astounding biodiversity. σ

- Expectations need to be reasonable, particularly with showing results over time (i.e., the pace at which we are expected to achieve outcomes need to be reasonable). σ
- Go slow, make it count, make it reasonable, allow for an adjustment period, provide crystal clear guidance and scoring criteria with examples, and above all else, please set us up for success. Climate change is not an easy topic to address, or we would have already completed the mission. σ
- Streamline the process regarding the actions needed to be climate-smart (e.g., how can we simplify our process to speed up climate-smart options)
- Recognize the work already being done at achieving climate benefits – how can we build in the connectivity piece to future rulemaking and evaluation criteria? Remove hurdles to facilitate these actions. How can we streamline this?
- There are many benefits to restoration projects, many of which overlap. OWEB's job, and the criteria for the review team - should be to maximize benefits. Climate change adaptation and resilience are one of those benefits and overlap with many others. Grantees have been considering climate change in our work for years. Consider what rules and criteria maximize the mission of OWEB and climate benefits while minimizing the burden on grantees - increased grant-writing, reporting, and tracking burdens detract from our ability to get the actual work done. σ
- Projects doing this work already – should they receive our funding?
- Consider ways to approach this without monitoring/quantification/verification
- How would rules impact fuels reduction projects? Oak/juniper conversion projects? Forest restoration projects? Ecological thinning/prescribed fires? If this is an accounting of impacts, how will these projects rank?
- Clarify how OWEB will evaluate metrics to determine project success in a climate-smart lens
- The way that some work around DEI is reevaluating hiring practices: assume everyone is qualified before narrowing it down. Consider whether this idea could be applied to the grant application, as it could reduce the administrative burden and change the way we evaluate grants.
- It is my hope that the rules will have enough flexibility that good projects which cannot meet the exact climate-focused criteria still have a possibility of being funded, but that the rules will help incentivize restoration that benefits climate resiliency. σ
- The regulations should include an emphasis on long-term actions, reaching beyond a century, to ensure maximal carbon sequestration as forests develop old-growth characteristics σ
- Please set long-term deadlines and goals so we can adapt within a realistic timeframe. Contractors are already scarce, and we do not want contractors to avoid OWEB-funded contracts. σ
- A practical cost-benefit assessment of options that accounts for both short- and long-term investments in best practices and equipment σ
- Defining/identifying general or trend impacts (e.g., positive, neutral, negative) is valuable, but it will be difficult/impossible (or not cost-efficient) to quantify specific

impacts (e.g., xx tons of carbon per year) for any of the project types we have participated with OWEB on σ

- Our group is primarily focused on implementing projects that improve water quality and fish habitat. Unless OWEB can demonstrate some practical ways to incorporate climate improvements into our projects, we do not see many opportunities to make meaningful changes. Since OWEB funding is competitive, if funding went more to projects that were able to incorporate climate-focused improvements, projects that might actually have more water quality or habitat benefits might suffer. If OWEB were to define some best practices that all grantees would use, that might take some of the competitiveness out of funding decisions. Climate improvement practices would be incorporated by all, but those projects with the most water quality and habitat benefits would get funded. σ
- Work with other funding entities to coordinate on guidelines and eliminate redundancies across funding platforms. σ
- Clear guidelines on what is valued to a greater extent and why σ
- We hope to have clear best management practices and resources to know where to put limited time and resources well in advance if and where applicable σ

III. Messaging & Outreach

- Messaging matters: how it gets presented will matter a lot to some parts of the state
    - Avoid the pitfalls of oversight of new concepts that people may not believe in whatsoever
    - Opportunities in eastern Oregon for outreach/education on climate impacts (a resistant population)
    - Get the message across in a non-threatening manner
- Remember that ideas/feelings about climate change varies greatly across the state. Fear is that climate change criteria will become most important criteria at OWEB; moderation in everything is always good.
- Recognize that organizations have already been doing this work for a very long time
- Climate change adaptation/mitigation around farmers
- Recognize priorities of the state vs. priorities of community
    - E.g., farmers see these benefits as long-term but are worried about feeding their families in the short-term
- Money is a priority for farmers – provide short-term incentives
- Explain how some climate considerations can apply to different practices
- Materials that are culturally translated, not just linguistically translated. σ
- There are many political processes that OWEB could get more strongly involved in; for example, could OWEB get involved in the political side of climate adaptation and mitigation to move things forward faster? A lot of this boils down to legislation and being involved in the legislative process.
- Recognize that this will not necessarily be an added incentive to folks already performing these projects; obtaining metrics and implementing monitoring costs money and increases the cost-benefit ratio

- Adaptation vs. mitigation vs. resilience – can we streamline this process and not get caught up in the difference between categories? From a statewide perspective, the discussion makes sense, but at an on-the-ground level, differentiations mean a lot less. There is a small population who want to be part of the solution to climate change, and others who want to build resilience.
- Show economic case studies for implementation on the ground, specifically for agricultural workers (this is an important story to tell)
- Small landowners are often suspicious of government and reluctant to accept help σ
- Retired resource professionals have experience that can help OWEB projects, but may not know how they can help climate projects near them σ
- Don't make this program too complex for the landowners and local partners, engage the local people constructively σ

IV. Adaptive/Iterative Process

- Science behind the "tools" is changing, so they must be revisited and updated as technology and knowledge evolve
- Many participants in the public listening sessions I attended discussed the importance of a simple, accurate, consistent "calculator" to gauge the impact of projects on climate considerations. Since there is no one widely accepted method for this now, perhaps OWEB can build flexibility into the rules by stating that the impact calculation process will change over time, and OWEB will notify applicants of the currently accepted process each year. σ
- Ensure there is flexibility in the rules to account for our state of knowledge evolving over time
- Flexibility is key; could be challenging to adopt rules around this as OWEB needs to be able to adapt to changing science and guidelines. σ
- Additional requirements will be a hinderance/barrier in applying
    - Start with qualitative, and move to quantitative down the road
    - Quantification is important, and OWEB should consider providing additional funding for this (do not treat it as a disincentive)
- Iterative process
    - Either in the rulemaking process or in the future, build in a feedback loop to get input from stakeholders and to see if things are working or not
    - Consider an iterative process around rulemaking specifically where the first take could move us down the path, but not be the end point until we have more science and data. Avoid rushing the process.

V. Other Comments

- Returning land stewardship to Indigenous people is the best bang-for-buck return on climate adaptation. Land Back initiatives and projects need to be considered under OWEB's climate resolution and granting evaluation. σ
- Manufacturing concerns – consider providing a list of approved vendors for monitoring equipment
- Be mindful of the effects on cost and budget due to supply chain issues; adding in additional considerations for grantees could exacerbate this

- To have a positive impact, we need to transition away from fossil fuels, and we need to conserve and restore our natural environment. Can OWEB lean into the second part of this; instead of thinking of criteria and metrics for grants, a larger question would be, how do we get more restoration done quickly? We will not solve this problem by tracking items, but by putting as much work on the ground as possible.
- Habitat-specific criteria may have merit, but could put important work by grantees out of commission
- Transportation is the largest emitter of carbon in the state. With EPA general assistance funds, Tribes are asked to provide information related to climate change and fuel-efficient vehicles are one way to respond – watershed councils might be able to incorporate this into their plans. [T]
- Develop a pilot program to see how this will all work [T]
- TNC has significant interest, experience, and technical expertise in terms of both climate adaptation and resilience and mitigation and Natural Climate Solutions (NCS). Part of the long-term vision for our NCS strategy is to provide technical resources and support learning that can encourage more NCS projects statewide. As we develop tools and research, we are open to opportunities to collaborate with OWEB and potential applicants. For example, we could share initial, coarse estimates of riparian reforestation carbon benefits and our plans for quantifying carbon from riparian reforestation projects in the next few years (which could yield future technical assistance resources). [O]
- Climate is the reason to get people moving but it is the loss of our biodiversity that will be our demise. The loss of biodiversity is paramount of an issue as is climate change. [O]
- Recently OWEB's level of managing grantee's management has been challenging. OWEB needs to rely on making wise business decisions based on grantee past performance and rely less on imposing more management based on hard lessons. [O]
- Rulemaking has been used as a tool of violence for the dispossession and genocide of Indigenous people, and Indigenous people are making strides, but still are not in positions of authority that allow for them to be represented in rulemaking. Scientific research has also been used as a tool of violence to tribal communities, and Indigenous knowledge does not need to be validated by academia to be efficient and true. [O]
- There is an abundance of work being done and that needs to be done, to prepare for the future. So please do not come from a scarcity mindset - find ways to bring abundance and joy to this work. [O]
- No reasonable person would deny the long-term threat of climate change to salmon survival (or our own survival for that matter). Climate change will require a global response. Funding to address environmental issues is already rare. Any action that filters salmon recovery efforts by their capacity to effect climate change is tantamount to weighing whether you need a new roof while your house is on fire. [O]
- Do all that is possible to keep stream water temperatures under control as much as practicable as the climate changes - from funding tree planting programs to identifying cold water sources. [O]

- I am concerned that rulemaking that mandates or requires carbon or other GHG sequestration will result in landowners being unable to sell carbon or other offset credits on property protected with OWEB funds. σ
- Forest fires, including traditional ecological knowledge, prescribed burning opportunities, leverage state and federal funds. Working with all state for urban agriculture local foods, drought improvements. σ
- Soil health, the right management practices and water is essential to agriculture productivity and the ability of folks to make a living farming and ranching. Watershed and overall landscape health is essential, and we must be prepared to adapt and mitigate to climate change. σ
- From my past experience (i.e., working with prior OWEB staff), I would say embrace counter approaches. That is, just because your staff doesn't like it because: 1) runs counter to their beliefs, or 2) how they interpret the goals and objectives ~ does not make them wrong. Next, you need to get all other State natural resource departments - ODFW, ODF, OWRD, OPRD, etc. on the same page. σ
- OWEB should be interested in increasing climate change funding (carbon credits, etc.), not limiting its use σ
- Although it is very important to think about how to make projects climate friendly, the real work needs to be done on a large scale and through policy on where there can be real and tangible results. This needs to target the larger impacts where there can be meaningful gains, or through projects that are focused on emissions reductions, carbon sequestration, and protection of carbon storage. Not every project is, and many restoration projects have numerous other benefits that should be equally valued. σ
- There may be work that is essential to a healthy ecosystem (prescribed fires, upland work, and so on) that creates emissions instead of reduces them, and this is something else for OWEB to consider, and we encourage you to continue to value this kind of work that leads to more resilient landscapes, too. σ
- Below-ground carbon and moisture need to be included in priorities. Clear-cutting reduces stream flow (and likely soil moisture and groundwater, as well) for several years, and needs to be reduced. The fastest carbon sequestration will occur in the coastal zone where forest growth is the fastest. Emphasis on reforestation should be prioritized in the coastal region. Please consider funding a couple sites of demonstration, educational forests where timber lands are taken out of rotation and converted over time to mature, complex forest structures, with educational trails and programs. σ
- All of our associates understand how to protect bodies of water. Your entity has continuously, since inception, been focused on politicizing the department with all intentions aimed toward unproven science and outcomes. Oregon is overburdened with departments providing little value to citizens and businesses. If you compare your successes with the total dollars spent, and an accountability dismissing those responsible for failure, our PERS liability would be less. σ

- Please consider going back to your roots as an organization. You cannot successfully fix or address all the problems in the World, or just in Oregon. When you stretch your mission into these narrow corners, you dilute your effectiveness overall. Conservation work, writ large, has built-in climate change outcomes; don't overlook these or try to reinvent the wheel. [σ]

5. What opportunities and challenges should OWEB consider as we pursue incorporating diversity, equity, inclusion, and environmental justice principles in our funding decisions?[3]

- We commend OWEB for its focus on DEIJ principles. In the context of funding forest conservation and restoration projects, there is opportunity to help economically underserved rural communities. Restoring towards more natural, resilient forest structure entails significant job creation. And crucially, Oregon's indigenous tribes possess significant traditional ecological knowledge that should be incorporated into the process.
- TNC offers the following principles to guide OWEB learning and action in this area:
    - Explicitly consider "benefits" and "burdens" from conservation projects & status quo using disaggregated socio-economic data whenever possible (acknowledging though, that this is likely beyond the technical capacity of many grantees and would require significant technical support).
    - Approach frontline and environmental justice (EJ) communities through an "asset based" versus a more common "deficit based" lens to help promote community agency and self-determination.
    - Invest time in developing long-term relationships; be careful that incorporation of DEI and EJ principles doesn't unintentionally promote transactional or extractive relationships between OWEB/grantees and frontline or EJ communities.
- Put underserved communities at the table with decision making power. The Tribes have understanding about resilience that should be centered in this work.
- The term environmental justice is a loaded and unclear as how it is being used. The term means the fair treatment of all people, but here there is a focus of only people from the underrepresented and impacted communities. What does that mean? Again, the approach is people-centric, it needs to be first and foremost ecologically-centric and those underrepresented and impacted communities. From an ecological perspective, we would argue that at a project 100s of species and habitat components and their functions that are provided need to be assessed not just a few!
- DEIJ is not going to be a one-size-fits-all consideration with climate change. Challenge: prioritizing DEIJ work with other prioritizes; how to balance investments; some projects will have a high DEIJ component and others won't. DEIJ is adding to the work we are already doing and some projects might be more climate-justice focused than others (i.e., conservation mosaic). Also, worth noting that OWEB should consider integrating DEIJ principles throughout the agency. Inequities and injustices exist in all facets of conservation work.
- Historically underserved populations often are impacted most heavily by climate change. OWEB already excels at communicating with those populations (e.g., Tribes, farmworker groups, etc.) and should get ideas from them regarding this question.

[3] All responses are from the survey

- Find ways to support engagement - open, honest engagement without pre-determined outcomes. OHA had a great funding announcement earlier in 2022 that (in part) supported climate change and community engagement work. Could OWEB partner with OHA to support more of that kind of funding and work and learn from the DEI perspectives OHA included in their grant-making? That would be great!
- As we are all discussing in our own exploration of DEI - all of this takes time. Supporting time takes money. Organizations want to do the hard work of DEI but it demands committed investment - to listen, learn, show up, and not bring pre-determined outcomes or demands to the table. Can OWEB support this time or partner with a funder than can support this time?
- Work with groups that are already working in these communities to develop rule and programs that address these principles. Be prepared to pay them for their time.
- Larger organizations with additional capital will be better situated to adapt to OWEB requirements and may have a leg up in having funding awarded. This means that these larger, well-established organizations (and the limited geographies they serve) may receive a larger piece of funding. For an ecosystem to be resilient, especially in light of a changing climate, the lion's share of the work cannot be done in a few select rivers, areas, or geographies. OWEB should consider providing additional resources to smaller organizations to help address these equity issues and to increase resiliency state-wide. One option OWEB could consider is reducing the significant other administrative burdens that OWEB requires elsewhere within projects (one example, funding requests for OWEB can take days of work sometimes) and within application processes (OWEB grant applications can often take upwards of 100+ hours of work to put together the written portion alone of one application - to quantify, that would be roughly $4,500 in staff time at a loaded rate. This does not even take into consideration project development time, landowner outreach, and so on, which can be hundreds more hours). These projects may not be funded. These time commitments impact smaller organizations to a greater extent due to limited capacity and reducing time small organizations are spending on these processes could allow limited funding to go to work that is helping to build a more resilient climate.
- Recognizing that certain groups may not have the resources to internalize additional cost to project to accomplish the best climate consideration BMPs and not withholding restoration funding based on a group's capacity in that regard.
- A cost/benefit analysis on all decisions.
- Outreaching to these populations and letting them know there are resources available for them. Lowering the match requirement and making the grant programs more accessible for these landowners. Part of this would involve providing more capacity to smaller watershed councils. Or providing state agency support for implementing programs.
- Small, underrepresented groups need unique funding assistance with upfront funding to support better proposal development (because it is time-intensive)

- Lots of flexibility in definitions. Likely many applicants will already be doing this work to some extent or need to incorporate this work with other work, such as community building or education.
- You all should experience some justice-related programming
- Opportunity to work with BIPOC organizations to get this work done. Need more outreach and BIPOC staff / board members that understand these communities.
- Tribes can bring a wealth of historical and current knowledge to the table. Watershed Council, NPO, local citizens can also provide invaluable information. I believe the challenge is in creating a system where others can be used to move a project forward efficiently vs a forum of critics.
- Colonialism and state violence are huge drivers of the climate crisis; how will OWEB's climate resolution support projects that seek to address these injustices that fuel the climate crisis? How will OWEB prioritize lessons FROM Indigenous people BY Indigenous people?
- Think about the capacity of the Tribes when making the funding decision. How can they best utilize the funds? Does the reporting create a burden to their administration?
- This is a very interesting question. I know that some in eastern Oregon, especially rural people feel disadvantaged and there is some truth to that in terms of access public services, income, health care etc., and that climate change will impact these folks, many who make less money and are older than a lot of Oregonians. So, anything that can be done to improve access to food, environmental quality, public services jobs, food access, healthcare, etc. would be good. Also, to live in places not subject to flooding. Many of these folks make their living in natural resources - farming, logging, fishing (seafood), etc. and watershed health is very important to these endeavors. Work on watersheds and other climate mitigation and adaptation projects could be good work opportunities. Also, the tribes must be engaged whenever possible on both trust and ceded treaty lands. I think a one-size fits all DEI approach should not be used but each region in Oregon should be considered differently when it comes to applying these criteria.
- Do not require DEI deliverables such as number of BIPOC people served, etc. Ask applicants to include DEI principles and concepts in the development of their projects, as applicable. Grant reporting on DEI should be open-ended. Finally, evaluate where OWEB is relative to the DEI goals for external projects. What is the diversity of the OWEB board and program staff? Is there opportunity to increase diversity internally?
- This creates another opportunity for "creative grant writing". What is the mission of OWEB and how does this meet the mission?
- Challenge: Ensuring that as many people as possible can participate in informational events. Opportunities:
    - Time meetings so that as many people as possible can attend, including some evening and weekend gatherings.
    - Record meetings but rebroadcast them with a live person available to answer questions.
- Challenge: Communities have set ways and DEIJ efforts must often use approaches that are uncomfortable because they differ from the habits established in the community.

    - Opportunity: Find and encourage techniques that will include a broad spectrum of people in the discussion, including outside facilitators, new approaches to outreach.
- Funding decisions should be made based on OWEB's goals and mission statement. Diversity, equity, and inclusion can be broad terms that may distract funders from excellent projects, no matter which community has proposed them.
- Challenge to define, qualify and quantify DEI in relation to project-based options and decisions
- Make sure all programs and information about the programs are made equally available to all sectors of society
- Acquire the necessary data in order to make the best decisions along these lines.
- If converting to greenhouse gas emissions free or reduced equipment, a large segment of the contract workforce will be potentially excluded from doing watershed restoration work.
- Opportunities to engage underrepresented community members. Challenging to quantify impacts.
- Large landowners and corporate partners offer opportunities to maximize funding, but these entities are not usually diverse, nor equitable for small landowners or peoples who have suffered environmental injustice.
- OWEB's primary goal is to improve water quality and habitat for fish. If too much emphasis was placed on diversity and equity in OWEB funding decisions, this might reduce the effectiveness of the OWEB-funded projects that improve water quality and fish habitat.
- Native lands being sold and desecrated.
- Applicants with diverse staff or beneficiaries may be funded when other projects give better climate benefits
- OWEB might consider including outreach funds in various grant opportunities. Projects will be enhanced by connecting with local communities, but often those communities are not already connected with the organizations doing OWEB-funded work.
- OWEB must recognize there is no "one way" to connect with and enjoy the natural world. Having more flexibility in terms of what kinds of improvements, and enhancements are helpful will allow for a diversity of ways to access nature.
- Fund more rural projects over urban ones is an opportunity. What do these issues have to do with climate change?
- Foolish. You are going to give preference because of race, or lack of proven ability to financially complete projects over knowledgeable businesses and contractors. That has proven to be a huge waste of tax dollars and the public resents the non-elected, unaccountable people and panels who make those decisions.

6. What opportunities and challenges should OWEB consider as we initiate outreach and engagement to traditionally underrepresented and impacted communities?[4]

- We suggest OWEB consider the following options to ensure traditionally underrepresented and impacted communities can access OWEB grant opportunities:
    - Increase effective outreach to a broader suite of potential applicants—using more listservs, doing direct outreach to organizations representative of underserved communities, and creating space outside of traditional working hours for questions & discussion of grant opportunities. Specifically, OWEB must find time to engage traditionally underrepresented communities outside of traditional working hours, within other forums that may only be tangentially watershed-related, and/or provide compensation & technical support to qualifying organizations that would otherwise be unable to competitively apply for OWEB grants.
    - Some grant programs have explored small incentive 'offsets' for capacity/funding-limited organizations to simply apply, because difficult/complex application processes are an innate systematic barrier to small organizations that may otherwise provide a great deal of value towards DEI/EJ goals.
    - OWEB needs to also consider the cost of building relationships and partnerships prior to their grant application. We hosted over 100 tours/meetings for one project prior to submitting to OWEB. This type of collaborative engagement is not free and, at a minimum, should be able to be counted as in-kind match towards the project application.
    - OWEB's FIP program may be a useful model for how to approach longer-term relationship and capacity building with communities and organizations that need additional support to be able to apply for OWEB grants.
- Focus on Ecosystem Services to those communities: their loss(es) or those they need to be replaced or enhanced.
- There is a real opportunity for OWEB to show up in these communities and listen to their truths and experiences. OWEB should show up prepare to acknowledge previous (and current) injustices and inequities in the way it administers its grant programs. OWEB should tie into Coalition of Oregon Land Trusts (COLT) Oregon Land Justice Project which seeks to increase Indigenous access, ownership and stewardship to land. Many of COLT's member's projects rely on OWEB funding and there is a good opportunity for OWEB to support this mission through its grant making process.
- OWEB is great at outreach and has cultivated strong partnerships with underrepresented communities. Encourage those communities to identify

[4] All responses are from the survey

opportunities and challenges both for outreach efforts and for funding efforts to help them mitigate and adapt to climate change.

- Be open to concerns and integrate representatives from these communities in formal decision making.
- OWEB should build meaningful relationships within these groups, and should also seek the perspective from organizations that have established relationships with these impacted communities.
- Provide incentives and resources as needed.
- More reliable funding is needed for outreach. Outreach that is impactful… free plants, free weed treatments, etc. Oftentimes underrepresented and impacted communities don't have the time to reach out to councils and develop a grant. Make the process easier and less cumbersome on the recipients.
- Do you know what those communities want to see done with these projects in general? Focus groups are a scientifically defensible method used to learn what a given constituent wants/needs from a given program
- Initial misunderstanding or miseducation on climate impacts and challenges and how it affects the end user.
- In-person communication as opposed to virtual communication. Outreach through trusted community organizations who have trust built in the community.
- Pay folks to do this work, pay folks to apply for funding, so if not funded they are continued to be under-resourced.
- Various languages, face-to-face staff meetings with diverse staff that can work collectively with the diverse Oregon organizations that represent BIPOC communities.
- I work for a Tribe that was here long before there was a state of Oregon. There has never been a listed fish under Tribal management. I've watched our Tribe and others sink millions in salmon recovery. Tribes inherited a slew of environmental issues and have been consistently underrepresented and underfunded. I would like to see a priority placed on Tribally sponsored projects.
- Pandemic has created more opportunities for disabled and chronically ill communities to participate in discussions like never before, how does OWEB plan to incorporate virtual meeting spaces and opportunities to continue this engagement?
- Each Tribe has different capacities – some have staffing issues; some have knowledge challenges. Don't create one solution for all.
- Each geographic region and often communities have their own characteristics. Don't think an approach in the Portland Metro Region will work in Klamath County or Grant County. Be flexible and tailor the approach.
- OWEB will need increased and sustained staff capacity to build relationships and trust and shared purpose for engaging.
- Opportunities: Provide extra funds, and administrative assistance, to support projects that hire individuals from underrepresented groups to participate in forest and other habitat restoration work. And/or, make funds available to assist the building of a work corp of underrepresented individuals, including high school students and

adults, who could work with different organizations to help implement their projects (like CCC, but available by contract to Trusts and other groups.)

- A challenge for OWEB will be determining who traditionally underrepresented and impacted communities are. There will be differing opinions here.
- Opportunity to more fully engage tribal TEK into project prioritization, planning and design options
- Make sure that awarding of funds for all programs are awarded based on the merit of the project and not who the submitted the project. Could be interesting to see how funding opportunities are awarded without knowing the grantee information prior to making the selection. Granted experience and assurance that there is carry through are important, which is a challenge but should not be the only driving factor.
- Ensure that large and small contractors are engaged from all over the state. You will most certainly get a diverse set of responses and will be able to better understand the challenges and opportunities statewide. Rural and Urban and Geographically Diverse companies must be engaged.
- Will be important to provide education to ensure all participants have similar baseline knowledge, and feel confident participating fully
- These underrepresented and impacted communities are often unrecognized by organizations like OWEB. First, make an effort to identify who is being impacted.
- How will OWEB define what are considered "underrepresented and impacted communities?"
- Educate, people in poorer communities have a smaller IQ. Ignorance creates emission through lack of knowledge on how creating waste effects the population around you.
- Reach out to organizations and schools in more diverse states
- Outreach funding will help organizations connect to underrepresented communities in their area of influence.
- As long as “communities” are a location, not a class or group of people, fine. If “communities” is a group, or class of people, expect more than resentment by voters.

7. Public listening sessions and tribal listening session large group discussion questions and input

I. What is your biggest concern about this resolution?

i. Capacity & Equity

- Rural, isolated, generationally impoverished watersheds have limited capacity compared to other parts of the state in getting good contractors. How does this affect our competitiveness regarding our contractors' abilities?
    - Smaller watershed councils, smaller contract organizations may go out of business because of unequal competition for funding. Local contractors concerned because it is not financially feasible to change equipment to meet criteria; they could then focus less on restoration work and transition to timber/road building.
- Concerns around equity; worried folks with more funds will have the opportunity to be more climate conscious and win the funding
- Rural communities
- Administrative burden to the field teams
- Inequity: small towns, small businesses may be less able to compete
- Concern about the administrative burden to the watershed councils in terms of 'checking boxes' for mitigation (most projects are centered around adaptation). Would like it to be flexible in the field so grantees are less concerned about meeting requirements on paper and more concerned with project success.
- Local contracting options may not have the resources to change to travel options or machines that reduce greenhouse gas emissions
- Concerns around the capacity of folks to quantify benefits
- Limited capacity to do extra work in grant applications; cannot turn this program into a disincentive
- Many projects already doing this; this could add unnecessary extra work
- Many emissions reduction practices already happening; other changes unattainable (e.g., changeover in equipment is a large investment)
- Equity challenges, including barriers to accessing programs, time needed to address considerations, and relationships with partners who are essential to be competitive and successful in accessing resources, especially around acquisitions
- Oregon's geography is diverse and climate-smart actions vary across the state; worry that the requirements will not be general or inclusive enough to represent all organizations' project lenses
- Unintended consequences: small local community farms, and their benefits to climate and to others, would ultimately produce small metrics and could appear unimportant
- Consider moving councils along faster on vehicle changes; for example, could OWEB offer a one-time investment for each council receiving a council capacity grant to purchase an electric vehicle (car or truck)? If you use $40K (on average) it would total about $2.4 million total to cover 56 councils.

ii. Messaging & Education

- Slow-to-implement solutions that are heavy on process steps feel unhelpful when communities are faced with the immediate threat of natural disasters (primarily wildfires)
- Mitigation needs education – what specific mitigation tasks are possible?
    - Contractors limited in electrical equipment
    - Not everyone can change tactics at the same rate
- Leaning too hard on climate change can create (political) barriers

iii. Current Projects & How This Fits

- Climate work rarely changes practices being done by OWEB grantees; much work currently being done fits in these climate categories
    - To show emphasis on these practices, would it eliminate more general benefits to climate resilience/mitigation? If yes, this could lead to inequities among conservation practitioners.
- Will it skew types of funded projects? Take money from restoration projects and send it to a narrow margin of projects? (e.g., if OWEB goes hard on one direction, such as carbon sequestration)
- Not sure how to change what we are currently doing; difficult to judge projects that are currently within a climate lens – will need to be very specific in the application process itself about what does/does not count
- A goal in the climate resolution is to bring climate considerations into the agency – is the intent to have applicants do that, and is the burden on them? Avoid onus on applicants/be careful of what you are asking applicants to do. T
    - Great work is already occurring; what is developed should be usable by applicants. Make this additive to the work already occurring, rather than an extra layer of work T
    - Do not put an extra onus on the groups doing good work now – need to make the link on how projects address climate change T
    - Projects already address adaptation and mitigation, so find ways to make it easier for applicants to make this additive (i.e., carbon mitigation and adaptation are additional benefits provided by projects that OWEB funds) T
- Work is already occurring – how to account for that in existing projects is what OWEB may be looking for T
- Perhaps OWEB could consider a new grant type program focused solely on climate change? It would place more emphasis on the topic, allow for faster movement on this topic, and would 'shelter' existing grant programs from too much change moving them away from their core purpose.

iv. Quantification & Tools

- Difficult to quantify sequestration benefits; makes applications difficult
    - How does this complicate monitoring and verification down the grant road?
        - Recommend that OWEB does not require farms to do verification, as it can be a deterrent to engaging in program

    - How will OWEB know the claims (i.e., in terms of mitigation benefits) are real?
        - Can we begin climate lens as a qualitative program, where evaluating and quantifying climate benefits come in later?
- Avoid problems in carbon market itself – priorities do not necessarily align with OWEB's values (e.g., clear-cut forests); think about goals (e.g., fish conservation vs. carbon sequestration)
- Concerns with OAHP becoming overly carbon-focused, specifically in terms of carbon quantification
- Will OWEB provide tools (e.g., carbon calculator)?
- Difficult to track metrics; takes expertise and money (e.g., who pays for this?)
- Tools are available, but not a lot of validation is available when it comes to agricultural projects. Also, consider how climate considerations would be evaluated (e.g., two different review teams – one that looks at current OWEB considerations, one that evaluates climate). This would be very difficult to implement for applicants. T
- Good idea to talk about and move forward with carbon capture (or some form of it) but trying to understand how it will work. For example, how do you measure and monitor carbon for livestock, forest management, etc.? T
    - Doing a climate project now with California, and it is a ton of work (i.e., for foresters) to have auditors and third parties come in. Do not know how OWEB will do this – cost factor might be a substantial challenge, as well as practical considerations. T
    - How to deal with OWEB projects that get caught up in a fire event? T
    - Younger forests act as more of a carbon sink than old growth, some education is warranted. T
- How does criteria evaluate projects that may release carbon but, long-term, enhance carbon sequestration or have other benefits?
    - Restoration is currently a short-term climate emitter
    - On the eastside, a lot of work goes into juniper removal. Those trees are capturing carbon but are not good for native range habitat. T
    - Many Tribes are pushing for cultural burning in forests; there is a tradeoff as carbon is put in the air, but this action potentially avoids catastrophic wildfire and much greater carbon emissions (and reduced habitat). T

v. Other Concerns

- In the climate resolution, it says "engage traditionally underrepresented communities", which sounds like a check box. Change the verbiage to say 'include' in how we implement. T
- Safeguards around tribal/treaty rights and cultural practices – some considerations would need to be given here if accounting is included T
- Forestry and animal agriculture are the biggest polluters. Where do we ensure enforcement in this?
- Spend too much time and money on meetings and developing written documents and policy and not as much on actionable impact and implementation. How to turn into action? This could become a box-checking exercise without driving any change.
- Concerns in the logging community about hydraulic fluid being dumped into watersheds

- "Dragging logs" and other efforts will be in vain if otter migration is not mitigated
- Water well applications are approved without being evaluated; many cannabis farms are not regulated and are stealing water resources
- Lack of infrastructure to make the most effective changes (e.g., filtering ash from streams after fires)
- Lack of usable data
- A political change in office could halt or impede efforts (e.g., encouraging climate-friendly development in central Oregon, but there are a lot of political pressures)
- Could it impact construction bidding? For example, commutes impacting carbon footprints.
- Restoration on private lands is voluntary – if we are too invasive, landowners could become less willing to do this work
- Investing in projects that will have limited longevity – they will be eclipsed by the speed of change, so where do transformative (i.e., radically different priorities or approaches) come in?

II. What is the best this resolution could do for Oregon & Oregon's watersheds (or for your Tribe)?

- Brings climate change to a different level in discussions across the state. Restoration has existed for a long time, but this forces us to move forward even more.
- Many projects exist with this lens in mind but do not necessarily direct all our thinking towards taking that stride. Incentives offer the opportunity to think through those other steps, usually looked over, and revisit how else it could be done with a climate focus in mind. But this directive could also represent challenges in implementation.
- Good thing to do, be careful how you do it and think of unintended consequences – it could impact the amount of future restoration actions in some rural communities
    - Goals of this resolution is what we have been working for – it is important to get these changes/aspirations documented and it is an opportunity to develop and share new tools to document carbon release/sequestration
- Electric tool technologies new and upcoming
- Link effort with DLCD and protecting forests and farms, halting suburban expansion in central Oregon
- Success! That things get better – communities can build resilient landscapes.
- No regrets – watershed health benefits from these changes no matter how far the climate stretches
- Whether or not the climate shifts to the degree that scientists say it will, implementing projects that have strong adaptation benefits and that enhance resilience is a "no-regrets strategy"
- Projects that will help enhance fish passageways, pool flow, complex habitat, will do a lot of great things without necessarily "looking through the lens" of climate change
- Excited about the possibility of integrating climate lens into agricultural grant programs (e.g., OAHP)

    - Possibility of monetary incentives to farmers/ranchers for practices that have the potential to sequester carbon and promote resilience, but avoid monitoring and verification requirements (or people will not engage as you hope they will)
- Larger opportunity to track carbon sequestration across different landscapes
    - Benefit the larger conservation community; spread of knowledge and assessing carbon benefits regarding land use
- Good opportunity to coordinate and collaborate with other agencies and organizations (e.g., the Columbia River Gorge Commission) to build new tools and maximize learning together
- Incentivize changes in mom & pop shops
- Standardize what projects benefit climate in which way
- Prioritize projects that go above and beyond; prioritize where we do projects
- OWEB can lead the charge in establishing climate-smart activities in grassroots movements
- Increased opportunity to tell grantees/applicant's stories to reach a wider audience with different, novel metrics
- Oregon can be a leader in implementing guidelines and rules, helping onlookers in adopting these guidelines, too
- Opportunity to move already-established climate resistance projects further towards climate-smart actions
- Opportunity to establish partnerships
- Potential to snowball other projects to existence in this space

III. Input from breakout room discussions

- Clarify what OWEB is looking for, including what a "good" answer is to climate questions
- OWEB-produced carbon calculator or tool
- Leverage other sources of funding to add to core funds shared with grantees
- Build awareness (grantees, contractors, etc.)
- Opportunity to create a climate-focused grant program. Could offer incentives for contractors to engage in electrical equipment transitions.
- Types of projects that organizations are already doing, and they are at capacity. They have no time for trainings, research, etc.
- Make the application as easy as possible
- How can OWEB streamline process to account for projects/applications ALREADY including climate-smart actions?
- Can we amplify the work being done to exemplify climate-smart actions?
- Avoid burdening grantees with quantifying metrics
- Focusing on conservation on the ground should take precedence over greenhouse gas emission reduction, recognizing that other state agencies can better target emission reductions
- Tracking metrics and quantify impacts of projects when it comes to climate. Folks don't know where to access the appropriate information.

- Equipment upgrades, not much available at the time. Represents opportunity for OWEB to provide more funds to folks looking to make this transition. Challenge: maintenance of these tools
- Could pose a barrier to hiring local contractors
- One rule may not be applicable to different communities and transitioning to that/those rules will not proceed at the same speed re: equity
- Adaptations are often not different than what you're doing! What's different is the explicit intent, and with that intent offers the opportunity to make small changes that domino into greater change.
- Folks worried we're moving too fast, not enough time to adjust to new evals
- Grant writing prohibitive regarding time. Can OWEB grant process give us a clue if we're doing the right thing? (Process-based efficiency)
- Rise in costs → makes you less competitive
- Large projects need specialized equipment with short-term carbon impact, BUT they impact climate resiliency of ecosystems. Folks already doing this work but not all grantees are on equal footing re: resources to complete applications. Need for balance thinking about inequities re: capacity.
- Monitor emissions without getting in the way of on-the-ground work. Recognizing long-game carbon offsets, and not letting one factor overrule potential project benefits
- Equipment conversions is expensive; can OWEB provide funds?
- Oregon varies widely. Different regions have different 1) capacity and resources; 2) climate understanding and acceptance; and 3) community resilience considerations, challenges and necessary actions
- Opportunity for training and learning together
- Support for OWEB taking an iterative approach to rulemaking. Learn and make changes along the way
- Converting current tools and equipment to electric (and the associated cost burden). Keeping in mind the variable climate and potentials for carbon sequestration may be bigger in some areas.
- Shared metrics in climate mitigation efforts will be a big and necessary component.

Kate Brown, Governor

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Agenda Item H supports OWEB's Strategic Plan priority # 4: Watershed organizations have access to a diverse and stable funding portfolio.

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Lisa Charpilloz Hanson, Executive Director
Stephanie Page, Deputy Director

SUBJECT: Agenda Item H – Wallowa Dam Rehabilitation and Fish Passage
July 26-27, 2022, Board Meeting

I. Introduction

On July 26, representatives from the Nez Perce Tribe and Confederated Tribes of the Umatilla Indian Reservation will speak to the board regarding planned improvements to the Wallowa Lake Dam. The board will tour the dam with Tribal representatives, the Wallowa Lake Irrigation District, and Oregon Department of Fish and Wildlife (ODFW) staff. This report provides background on the dam rehabilitation and fish passage project.

II. Background

Wallowa Lake is a natural glacial lake that was dammed in the early 1900s. The lake provides drinking water for downstream communities, irrigation water, and flood control. It is also a popular recreation location that supports the regional economy.

Prior to dam construction, the lake and its tributaries provided habitat for sockeye salmon. Sockeye were an important resource to Tribes in the area. The dam does not provide fish passage and contributed to the extinction of sockeye salmon runs at the lake.

In the 1990s, the dam and lake storage capacity was reduced due to safety concerns. Irrigators began to explore solutions to rehabilitate the dam and restore storage for irrigation, flood control, drinking water, and fisheries.

The Nez Perce Tribe, the Confederated Tribes of the Umatilla Indian Reservation, the Wallowa Lake Irrigation District, and ODFW worked together to reach an agreement to rehabilitate the dam, provide fish passage, instream flows for fish, irrigation, drinking water, and flood control. The parties signed an agreement in 2020 regarding the protection of water instream.

The Oregon Legislature and Governor Brown have allocated funding for the dam rehabilitation and fish passage project. The project will open the lake and its tributaries to several fish species and will provide an opportunity to restore sockeye salmon.

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III. Current Situation

In 2022, the Oregon Legislature will begin disbursing funds needed to start work on the dam rehabilitation and implement the 2020 agreement.

As fish passage restoration efforts move forward, there will be fish habitat restoration opportunities in the tributaries that flow into the lake. There are also fish diversion screening and barrier removal needs below the dam. It is likely that OWEB will receive applications for projects to address some of these needs in the future.

IV. Recommendation

This is an information item only.

Kate Brown, Governor

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Agenda Item I supports OWEB's Strategic Plan priorities # 1-7.

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Courtney Shaff, Business Operations Manager
Eric Hartstein, Board and Legislative Coordinator

SUBJECT: Agenda Item I – DEI Discussion: OWEB Board Equity Goals
July 26-27, 2022, Board Meeting

I. Introduction

This staff report provides an update on the agency's Diversity, Equity, and Inclusion (DEI) work. At the July board meeting board members will engage in an exercise facilitated by ECONorthwest, to begin to develop board equity goals.

II. Background

In the fall of 2021 staff hired ECONorthwest to work with OWEB staff and the board on a series of DEI trainings, an evaluation of agency grant practices with a DEI lens, and development of a board equity statement.

III. July 2022 Update

Since January 2022 board and staff have participated in a series of DEI related trainings facilitated by ECONorthwest. Topics have included DEI definitions, watershed inequities, and a conversation with non-traditional partners. Over the next six months ECONorthwest will finalize a report on OWEB's grant making practices to be shared with staff and the board and present the proposed board equity goals to the board for consideration. At the July board meeting, Jade Aguilar and Shivangi Jain from ECONW will lead a discussion to identify and develop equity goals for the board.

IV. Recommendation

This is an informational item only.

Kate Brown, Governor

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Agenda Item J supports OWEB's Strategic Plan priorities # 1-7.

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Courtney Shaff, Business Operations Manager
Audrey Hatch, Conservation Outcomes Coordinator
Linda Repplinger, Publications Specialist

SUBJECT: Agenda Item J – Strategic Plan Update
July 26-27, 2022, Board Meeting

I. Introduction

This staff report provides an update on progress towards implementation of the 2018 strategic plan. At the board meeting, staff will review the new reporting format and highlight accomplishments.

II. Background

In June 2018, the board approved a new strategic plan. Beginning with the October 2018 board meeting, staff prepared quarterly reports to update the board on strategic plan implementation. Since October 2018, all staff reports include a reference to the most relevant Strategic Plan priorities.

The most recent update was provided in January 2022 and covered the time frame November 2021 through January 2022.

III. July 2022 Update

Staff initiated a process to update strategic plan reports through a facilitated discussion at the June All-Staff meeting. Several new staff have joined OWEB since 2018, and the discussion provided an opportunity to review the current strategic plan as well as reflect on new developments since the plan was adopted. Accomplishments within the past few months were noted, including: Diversity, equity and inclusion training for board and staff; climate listening sessions; and initiating new granting programs including Post-Fire Recovery, Drought Resilience, and the Oregon Agricultural Heritage Program.

A new reporting template was developed and discussed at the July All-Staff meeting (See attachment A). Future staff reports will be provided quarterly using this format. Recognizing that we are halfway through the current strategic plan, staff plan to produce a one-page overview of accomplishments by the end of the biennium.

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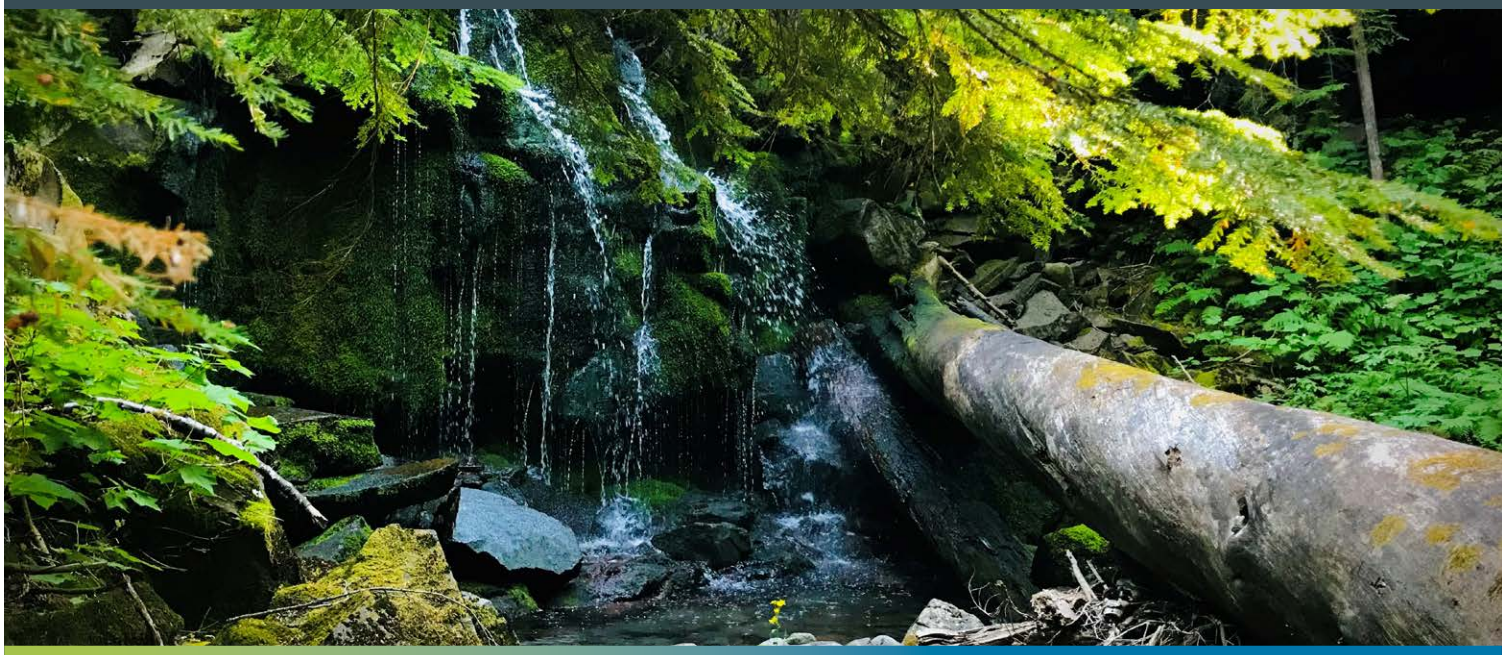
IV. Recommendation

Attachment

A. OWEB Strategic Plan Report, January -July 2022

OREGON Watershed Enhancement Board



2018-2028 Strategic Plan

Quarterly Report to the Board | July, 2022

Mission: To help protect and restore healthy watersheds and natural habitats that support thriving communities and strong economies.

Priority 1

Broad awareness of the relationship between people and watersheds

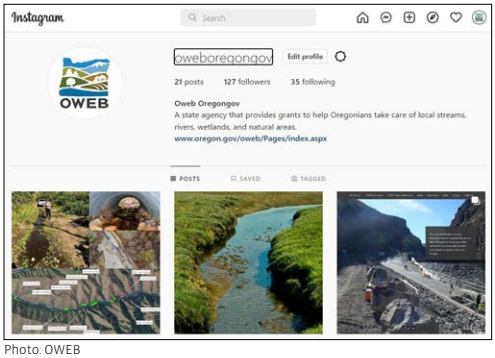


Photo: OWEB

OWEB began using **social media platforms** in April, 2022 to uplift stories of grantees and their projects. This outreach also shines a light on uses of OWEB funding sources, OWEB services, and increases watershed awareness. As of July 2022:

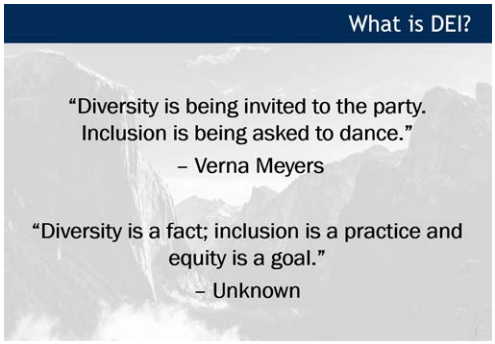
- Over 100 followers on both FaceBook and Instagram.
- 5-10 posts a week.
- FaceBook engagement is between 1-10/post, Instagram engagement is between 10-20/post.


PCSRF annual report

Pacific Coast Salmon Recovery Fund (PCSRF) provides a significant amount of funding to the state of Oregon. Every year, OWEB provides information and stories about on-the-ground work for the **PCSRF annual report.** These reports provide an opportunity to share outcomes with partners and contributors. The 2022 PCSRF annual report highlighted the Opal Springs Volitional Fish Passage project.

Priority 2

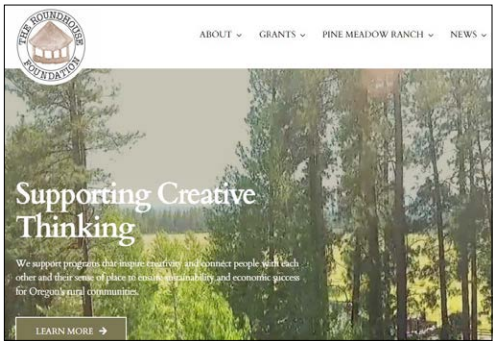
Leaders at all levels of watershed work reflect the diversity of Oregonians



Slide from ECO NW

All OWEB staff and board members attended **Diversity, Equity, and Inclusion (DEI) training,** conducted by EcoNW. This training allows staff and board members to acknowledge and make efforts to bridge inequalities and engage with a diversity of communities in respectful and meaningful ways.

- Four training sessions, one with staff and board members together.
- Consultations were held with EcoNW and OWEB's Inclusion, Diversity, Equity, and Advancement (IDEA) Team.



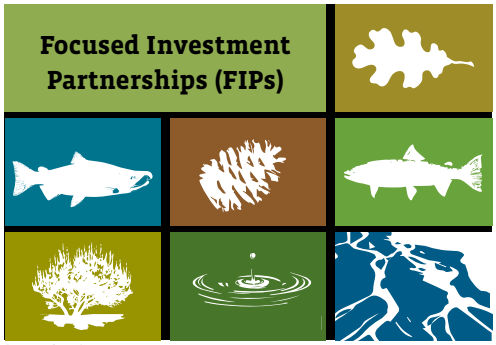
Roundhouse Foundation website

OWEB leadership **met with several non-traditional partners** in the first half of 2022. These meetings help OWEB to learn directly from partners about potential barriers to engage in natural resources restoration efforts and to plan how to make natural resource restoration more universally accessible.

- Met with: the Organic Coalition, Capitol Connections, Albina Vision Trust, Roundhouse Foundation, and a group of agricultural stakeholders.

Priority 3

Community capacity and strategic partnerships achieve healthy watersheds



Report: OWEB

OWEB incorporated several improvements to the agency's grant making. In one example, the Focused Investment Partnerships (FIPs) evaluation process was modified to give applicants an opportunity to clarify questions that may arise from the review team, resulting in greater consistency and more informed recommendations to the Board. In another example, Adaptively Managing Restoration Initiatives were developed within the context of the FIPs. This document outlines specific recommendations to help practitioners overcome common challenges with long-term partnership implementation.

Photo: OWEB

OWEB leadership met with partners who are actively engaged in watershed restoration throughout working landscapes in rural Oregon. These experiences provide vital information to OWEB staff and board about the successes and challenges of grant programs and help these programs adapt and become more effective.

- Toured Harney County with the High Desert Partnership.
- Attended event with Oregon Senator Jeff Merkley to celebrate the securing of Congressionally Directed Spending to advance the Kellogg Dam Removal & Resilience Project.

Priority 4

Watershed organizations have access to a diverse and stable funding portfolio

Photo: BLM

OWEB received Federal Infrastructure funds in addition to an annual Pacific Coast Salmon Recovery Fund award to assist with Salmon Recovery, Restoration, Monitoring, and Technical Assistance projects.

- **FFY2022 Pacific Coast Salmon Recovery Fund (PCSRF).**
- **Good Neighbor Authority (GNA) agreement with BLM** will last 10 years and bring up to $25 million dollars of funding to local partners.

Photo: ODF

OWEB offers **new General Fund granting opportunities to address post-fire recovery and drought relief.** This Funding is made available to quickly address high-priority, emerging natural resources needs. These grants enable conservation partners and landowners throughout Oregon to engage in coordinated recovery and resilience work.

Priority 5

The value of working lands is fully integrated into watershed health

Photo: Jim Choate

The **Oregon Agricultural Heritage Program (OAHP)** offers grants to assist with the management of farmland during the transition from one generation to the next in a way that benefits farming families and the land. This program will restore and maintain the health of working lands, help to control invasive and noxious weeds, and demonstrate healthy watershed management practices to the next generation of farmers.

- OWEB received $5 million for OAHP and the OAHP commission decided to invest $4.46 million to purchase working lands conservation easements and develop conservation management plans..
- In June, OWEB hired an OAHP Coordinator and sent out a recruitment for 2 seats on the Commission.

Priority 6

Coordinated monitoring and shared learning to advance watershed restoration effectiveness

Photo of John Day IMW: OWEB.

OWEB contributed information from the Middle Fork John Day River to develop a **synthesis report on the Management Implications from Pacific Northwest Intensively Monitored Watersheds (IMWs).** The report compiles data from 13 IMWs to provide quantifiable evidence of how restoration efforts such as the placement of large woody debris, riparian restoration, barrier removal, and beaver dam analogs have led to improvements in watershed health, aquatic habitat, and the viability of salmon and steelhead. These findings help inform future restoration research, management, and practices.

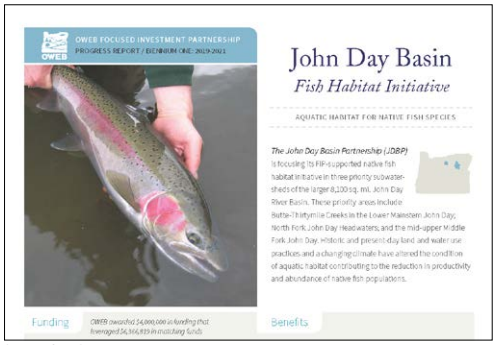
Photo: Amy Stiner, SF John Day WC

Pre-application Monitoring Grant consultations assist applicants to prepare for a competitive application and understand OWEB reporting requirements. These consultations determine if the project scope meets eligibility requirements, actions that may be needed before an application is submitted, and to share technical resources that may be available. From January–May 2022:

- OWEB's Effectiveness Monitoring Coordinator and Regional Program Representatives participated in 30 pre-application consultations.
- 25 monitoring applications were submitted during the Spring 2022 Open Solicitation grant offering.

Priority 7

Bold and innovative actions to achieve health in Oregon's watersheds



Report: OWEB

OWEB sustained solicitation for long-term, landscape-scale restoration projects, including **Focused Investment Projects (FIPs) through the pandemic.** Sustaining these programs protects current investments and maintains projects that have a large impact on Oregon.

- 11 of FIPs currently open.
- 11 applications for FIP Initiatives, awards will be made in July, 2022.

Slide: OWEB

Public engagement listening sessions for OWEB's Climate Resolution 01-2022 were held between April-May, 2022 so that OWEB could learn from their partners and stakeholders about the potential associated challenges and opportunities and seek out varied viewpoints. Thoughts and concerns will be shared with the OWEB Board, helping to inform considerations around climate-related rulemaking and giving them a voice in implementing new processes.

- 6 public engagement listening sessions via zoom, 77 unique participants.
- 1 tribal listening session
  - invited 10 tribes (including all 9 Federally-recognized tribes).
  - 16 folks attended, representing 8 tribes.
- 1 online survey with 44 responses.

This report provides an update on the next offering of Partnership Technical Assistance (TA) grants.

Background

At the July 2021 meeting, the board adopted its 2021-2023 spending plan, allocated $1.5 million for Partnership TA grants, and approved staff to offer two grant cycles this biennium. In July 2021 staff solicited for the first round of grants and received 12 applications. In January 2022 the board awarded six applications for a total of $796,877, leaving $703,123 available for future Partnership TA grants this biennium.

Future Grant Offerings

Business Operations Manager Courtney Shaff has been the point for Partnership TA grants since they were initiated in 2015. OWEB was in the process of transferring project management and program coordination activities to Partnership Coordinator Taylor Larson beginning with the board awards in January 2022. In June 2022 Taylor began as OWEB's new Oregon Agricultural Heritage Program Coordinator. This change in duties has left a gap in program coordination and project management of these grants. OWEB's Regional Program Representatives have taken over project management of open grants in their regions and Courtney Shaff has resumed program coordination. OWEB's Management Team is in the process of assessing workload and staffing responsibilities before assigning program coordination to another staff person with an already full portfolio. Staff are planning on delaying solicitation of the next Partnership TA grant cycle until at least January 2023, to allow staffing and workload decisions to be complete. Staff will update the board and partners at the October 2022 board meeting with more information on the schedule for future offerings.

Staff Contact

If you have questions or need additional information, contact Courtney Shaff, Business Operations Manager, at 971-345-7012, Courtney.shaff@oweb.oregon.gov.

This report provides an update about OWEB's social media outreach.

Background

In April 2022, OWEB began using social media platforms to uplift stories about OWEB grantees and their projects. The effort also aims to demonstrate the services OWEB provides, highlight OWEB funding sources, including Oregon Lottery, Pacific Coastal Salmon Recovery Fund, Salmon License Plate funds and other funds, and help people to understand the importance of watersheds.

During this first phase of social media outreach, the effort is focused on letting OWEB grantees know that we would like to celebrate their successes and encourage engagement. In June OWEB sent an email to all grantees informing them of OWEB's social media activity and requesting stories, videos, and pictures that can be highlighted.

As the platforms grow, the initiative provides opportunity for interaction between grantees, partners, and the interested public to learn and grow from each other. This creates the possibility to touch on priorities within the strategic plan, including increased awareness of the importance of watersheds on a personal level, shared lessons learned, and engagement with non-traditional partners.

Facebook

The Facebook account was revived in April 2022. Between 5-10 posts are made a week; the posts focus on grantees' projects, event announcements, and related stories. OWEB currently has over 100 followers. Typical followers are individuals, grantees, and university students. Engagement with posts averages between 1-10 reactions.

Instagram

OWEB added an Instagram account in late May 2022. Instagram shares the same posts as the Facebook platform with slight adjustments to fit the Instagram image size and methods of tagging and linking. Between 5-10 posts are made a week. OWEB currently has over 120 followers, with a similar make up as the OWEB Facebook followers. Engagement with posts averages between 10-20 reactions.

YouTube

OWEB uses its YouTube channel to share live meetings, recordings of meetings, webinars, and instructional videos. Notices about live meetings are shared on Facebook and Instagram.

Staff Contact

If you have questions or need additional information, contact Courtney Shaff, Business Operations Manager, at 971-345-7012, Courtney.shaff@oweb.oregon.gov or Linda Repplinger, Publications Specialist, at linda.repplinger@oweb.oregon.gov or 971-719-3255.

This report provides the board an update about the status of OWEB's Post-Fire Recovery and Drought Relief grant programs.

Background

During 2021 and 2022 Legislative sessions, OWEB received General Fund support for post-fire recovery grant-making. Allocations included $19.75 million to address impacts of the 2020 wildfire season, and $5 million to address impacts of the 2021 wildfire season. During the 2nd Special Session in December of 2021, OWEB received $11.627 million in General Funds to support drought relief grants and grant program administration.

Post-Fire Recovery Grants

For the 2020 post-fire recovery funding, OWEB has allocated nearly $5 million of funding across three fire areas in grant agreements or pending grant agreements. The fire areas are Holiday Farm (as part of the specific legislative funding allocation to the Eugene Water and Electric Board [EWEB] via OWEB), Beachie Creek, and Indian Creek fires. These grants support riparian and upland replanting and floodplain restoration/reconnection, with a focus on addressing post-fire soil-stabilization needs and water-quality impacts. A second grant cycle closed on May 31, 2022, and nearly $3 million in grant requests were received across seven fire areas: Almeda, Beachie Creek, Brattain, Echo Mountain, Riverside, South Obenchain, and White River. At the timing of writing of this staff report, these grant applications are under review. EWEB and its partners in the Holiday Farm Fire area have multiple land acquisition projects in development, with one or more grant applications pending that will request up to $1 million. A third post-fire recovery grant cycle for both replanting and floodplain restoration/reconnection grant requests will be open August 1-31, 2022. The need for additional grant cycles will be assessed after the August 2022 solicitation closes.

For the 2021 post-fire recovery funding, staff are developing the grant offering for this funding, with an anticipated launch date of September 1, 2022. Eligible activities will include soil stabilization and erosion control through activities such as replanting and reseeding of burned areas, detection and treatment for invasive species, culvert repair or replacement, and restoration activities such as instream structures to help slow run-off and capture sediment. Eligible fire areas will include Bootleg, Cougar Peak, Elbow Creek, Fox Complex, and Skyline Ridge, among others.

During legislative days in early June, OWEB staff provided an update about the post-fire recovery General Fund investments to the House Interim Special Committee on Wildfire Recovery.

Drought Relief Grants

The General Fund supported six categories of drought relief funding. These categories and status updates about each follow:

- $3 million to the Jefferson County Soil and Water Conservation District (SWCD) to support stewardship practices on irrigated land that is at high risk for erosion and soil degradation, and to limit proliferation of noxious and invasive weeds – OWEB staff created a grant offering for this funding, and Jefferson SWCD submitted a grant application in mid-May 2022. The application currently is undergoing review, and an executed grant agreement is anticipated in early July.

- $3 million to support grants and OWEB program administration for livestock watering wells and construction of off-channel water facilities in Klamath County – OWEB staff created a grant offering for this funding, and the first grant cycle is open May 31-June 30, 2022. A second grant cycle is anticipated to open in mid-July 2022 and close on September 1. If funding remains available, a third grant cycle will open in early November and close in late December 2022.
- $2 million (including grant funding and OWEB program administration costs) for matching grant funding to North Unit Irrigation District (NUID) for investments in irrigation modernization projects within the NUID boundary in Jefferson County – OWEB staff currently are developing this grant program and coordinating with NUID about potential uses of the grant funding to assist with match funding needs for priority projects. At the time of writing of this staff report, OWEB staff are working with NUID to refine timing for this program, with the intent of better alignment with the NUID process to develop a watershed plan as part of the federal PL 83-566 funding program with the USDA Natural Resources Conservation Service.
- $1.627 million (including grant funding and OWEB program administration costs) to irrigation districts for matching grants to support statewide investments in irrigation modernization (IM) projects – OWEB staff currently are developing this grant program, informed by outreach that was completed to better understand match fund needs for IM projects around the state that are shovel ready. OWEB anticipates opening a grant cycle for the Statewide Irrigation Modernization by July 30, 2022. The close date is yet to be determined.
- $1 million to support drought resiliency projects in Jefferson County – OWEB anticipates opening a grant cycle for this funding by September 1, 2022. The close date is yet to be determined. OWEB staff have conducted extensive outreach with local partners in Jefferson County to better understand needs and opportunities for use of this funding.
- $1 million to support drought resiliency projects in Klamath County – OWEB anticipates opening a grant cycle for this funding by September 1, 2022. The close date is yet to be determined. OWEB staff have conducted extensive outreach with local partners in Klamath County to better understand needs and opportunities for use of this funding.

During legislative days in early June, OWEB staff provided a written update about the drought relief General Fund investments to the chair of the House Interim Committee on Agriculture, Land Use, and Water.

Staff Contact

If you have questions or need additional information, contact Renee Davis, Fire, Klamath, and Drought Programs Manager, at renee.davis@oweb.oregon.gov or 971-345-7231.

Kate Brown, Governor

OREGON WATERSHED ENHANCEMENT BOARD

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Agenda Item M supports OWEB's Strategic Plan priority #3: Community capacity and strategic partnerships achieve healthy watersheds.

TO: Oregon Watershed Enhancement Board

FROM: Courtney Shaff, Business Operations Manager

SUBJECT: Agenda Item M- Organization Collaboration Grant Awards
July 26-27, 2022, Board Meeting

I. Introduction

This staff report provides an overview of the 2022 Organization Collaboration grant offering and staff funding recommendations. Staff request the board approve the funding recommendations outlined in Attachment A to the staff report.

II. Background

OWEB initially began offering Organization Collaboration grants in July 2013. The funding is intended to support new, or expand, strategic collaborations to build resilient, sustainable, local organizations that achieve ecological outcomes and engage communities. Organization Collaboration grants may support the following activities:

- Mergers/consolidations of organizations.
- Development of formal alliances, that is an arrangement between two or more organizations to work together on a mutually beneficial project while retaining organizational independence.
- Development of action networks, that is a network of organizations that seek complete alignment to achieve specific objectives.

The applicants must demonstrate that the options being considered will strengthen the impact, build resiliency, and sustainability of multiple organizations to help increase their ability to engage local communities and implement restoration and/or acquisition.

III. Solicitation Process

In October 2021, staff announced the Organization Collaboration grant offering. The deadline for applications was February 24, 2022.

Prior to submitting a proposal, applicants were required to participate in a consultation with staff. During the consultations, staff discussed the purpose of the program, allowable activities, evaluation criteria, and timing.

IV. Review

Six applications were received by the February 2022 application deadline. Since these are collaborative proposals often seeking organizational change across multiple organizations, OWEB staff allow the applicants to answer initial questions identified by the reviewers before the final technical review and development of the funding recommendation.

The technical review team met in March 2022 to complete an initial application review and identify any questions on the applications. Follow-up questions were sent to all applicants, and they had two weeks to respond to the reviewer questions. Responses were shared with the review team members one week before the team met to complete the final application review and develop funding recommendations to OWEB staff.

V. Current Grant Cycle Staff Funding Recommendations

Staff recommend funding four of the six applications as described in Attachment A at a total of $236,721. The organizations recommended have worked together in various forms for many years and have used their own financial and human capital to develop current partnership structure. The application and secondary review process demonstrated the organizations are committed to this process and ready to explore organizational options to improve their collective capacity to engage stakeholders and implement conservation actions.

Staff believe that the two applications that are not recommended for funding are pursuing meaningful collaborative work that aligns with the purpose of this grant offering. However, as described in the evaluations (Attached B) the technical review team did not think these proposals demonstrated clear outcomes supported by all partners.

VI. Recommendations

Staff recommend the board award the Organization Collaboration grants consistent with the amount recommended in Attachment A.

Attachments

A. Staff Funding Recommendations
B. Evaluations
C. Evaluation Criteria

Staff Funding Recommendation 2022 Organizational Collaboration Grants

Organization Collaboration Applications Recommended for Funding (Not in Priority Order)

Application Number	Applicant	Project Title	Amount Recommended
223-8071	Lower Nehalem WC	NW Oregon Watersheds Collaboration Analysis	$ 26,992
223-8073	Rogue River WC	Rogue Drinking Water Partnership	$ 61,116
223-8074	North Clackamas WC	Shared Staffing: N. Clackamas and Greater Oregon City WCs	$ 74,913
223-8076	Calapooia WC	Mid-Willamette Beaver Partnership	$ 73,700
Total Organization Collaboration Applications Recommended for Funding by TRT and OWEB Staff			**$ 236,721**

Organization Collaboration Applications Not Recommended for Funding by TRT			
Project Number	**Applicant**	**Project Title**	**OWEB Request**
222-8072	Willamette Partnership	Oregon Oak Alliance	$ 49,500
223-8075	Coast Fork Willamette WC	Prioritization Collaboration with Tribal Partners in the U. Willamette	$ 74,975
Total Partnership TA Projects Not Recommended for funding by TRT			**$ 124,475**
TOTAL: All Partnership TA Project Requests			**$ 361,196**

Organizational Collaboration Application Evaluation

OVERVIEW

Project #: 223-8071

OWEB Region: 1

Applicant: Lower Nehalem WC

Application Name: NW Oregon Watersheds Collaboration Analysis

Requested Amount: $26,992

Applicant's Summary

Environmental non-profits in Northwest Oregon are limited by their small staff sizes and access to funding. This prevents them from taking advantage of economies of scale and sometimes results in organizations replicating the efforts of other organizations in the region. This project proposes to hire a consultant to first guide the project partners through a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis. This analysis will consist of a discovery phase, interviews with staff and board members, and a survey. The consultant will use the intersections of these results to determine areas of potential collaboration among the participating watershed councils. The contractor will then facilitate the participating organizations' development of MOUs to establish partnerships around these focal areas.

The project partners anticipate that areas of potential collaboration will be identified in the following 5 categories: 1) Administrative: Governing Documents, Fiscal Policy, Personnel Policy, Conflict of Interest Policy, Field Safety Policy. 2) Outreach: Development, Social Media, Speakers / Events coordination, Coordinated Regional Outreach Strategy, Donor / Funding Database, Volunteer Coordination and Training, Regional Volunteer Management / Volunteering Hub. 3) Restoration Support: Wood Salvage and Storage, Contractor Lists, Trained Field Personnel, Permitting Support. 4) Technical Assistance: GIS Support, Regional Monitoring and Assessment Protocols, Pre-Project Scoping/Analysis, Information Gaps. 5) Business Operations Continuity: Regional Watershed Council Group Insurance, Regional Watershed Council Retirement Group, Successional Planning.

This collaboration will include the Lower Columbia River Watershed Council, North Coast Watershed Association, Necanicum Watershed Council, Upper Nehalem Watershed Council, Lower Nehalem Watershed Council, Tillamook Estuaries Partnership, and the Nestucca, Neskowin, Sand Lake Watershed Council.

REVIEW SUMMARY

Application strengths identified during review include:

- The application demonstrates broad support from board members of all the partners and the surrounding community.
- The partners have been working together for many years and this is the logical next step in their partnership.

- There is a lot of opportunity for collaboration represented in this partnership, with many small organizations facing similar challenges that may be addressed by finding efficiencies through partnerships.
- The proposed consultant has the technical skills necessary to successfully complete the work as proposed.
- The proposal identifies a common vision for success and has a realistic timeline and budget.
- The partners have a good understanding of how increased organizational capacity could increase their ability to implement restoration and acquisition projects within the collective geography.

Application concerns identified during review include:

- There are many partners working in the proposal's geography, the application provided limited details on why these specific partners were selected and why others were not included.
- Staff of the partnering organizations have a diversity of skills; however, the application does not clearly describe how the work will be distributed among the partners or each partner's specific roles and responsibilities.

Concluding Analysis

The organizations in the proposal have been working together for many years and have a good understanding of their individual organizational challenges and the possible opportunities for collaboration. Given the wide geography present with this partnership and the multitude of organizations involved and the diversity of skills, it is possible that several alternatives of collaboration between a sub-set of the groups may be identified and more achievable in the short-term. Board engagement in the Strength Weaknesses Opportunities and Threats analysis will be important for a successful outcome. The successful completion of this process could be a first step in increased collaboration and enhancing each organization's ability to implement restoration and acquisition projects in their local communities.

Review Team Recommendation: Fund

Staff Recommendation: Fund

Amount: $26,992

Organizational Collaboration Application Evaluation

OVERVIEW

Project #: 223-8072

OWEB Region: 3

Applicant: Willamette Partnership

Application Name: Oregon Oak Alliance

Requested Amount: $49,500

Applicant's Summary

This project spans the west side of Oregon, covering the historic range of Oregon White Oak, and will fill a gap in setting a statewide vision for oak and prairie conservation and provide the partnership structure and guiding document for implementing that vision.

In 2019, a core group of partners, all developing formal partnerships and associated strategic action plans through OWEB's Focused Investment Partnership Development grant program, began convening with the intent of sharing information and resources across partnerships. The loosely named Pacific Northwest Oak and Prairie Alliance (Oak Alliance) operates as a collaborative made up of partners with a shared commitment to oak and prairie conservation and serves under the umbrella of the 5 oak partnerships (East Cascades Oak Partnership, Intertwine Alliance Oak and Prairie Working Group, Willamette Valley Oak & Prairie Cooperative, Umpqua Oak Partnership, and Klamath Siskiyou Oak Network). Representation from these partnerships has created an information transfer network, reaching over 150 organizations and programs across the state. Beyond representation from each partnership, there is active participation from 39 individual organizations from BC, Canada to northern California. It is currently a loose partnership with no formal structure.

This project proposes to formalize the Oak Alliance through a partnership agreement, facilitate the co-creation of a shared vision for oak and prairie conservation in Oregon, and co-develop the next iteration of the 2017 Prairie, Oaks and People - A Conservation Business Plan to Revitalize the Prairie-Oak Habitats of the Pacific Northwest.

The coordinators of each of the five oak and prairie partnerships in Oregon currently serve as active representatives for their individual partnerships on the Oak Alliance and in this project. These coordinators, Pacific Birds staff, and some additional partners have formed a leadership team for this project.

REVIEW SUMMARY

Application strengths identified during review include:

- The staff involved in the proposal have the necessary skills to successfully complete the proposed project.
- The partners have been collaborating for many years on Oak Habitat restoration and all the partners are engaged in this proposal.
- The partners clearly explained the plan for tribal engagement.

- Marketing and outreach tools described in the application can be valuable resources for stakeholder engagement.

Application concerns identified during review include:

- It is unclear how the products from the proposal would be used locally to increase the partnership members' ability to implement restoration and acquisition projects within each partnership's geography.
- The application does not clearly describe the roles and responsibilities of the individual partner organizations.
- The scale of the proposal is very large and might be too big for meaningful deliverables with immediate impact on oak restoration.
- The application lacks a clear case for the need for the proposed work among all five partners, some of which are currently applying for a Focused Investment Partnership grant.

Concluding Analysis

The Oak Partnership has been working together for several years to advance oak restoration in Oregon and Washington. All the oak partners are engaged and want to develop a common vision and communication tools to continue to advance work in oak habitat. This application proposes to work across five partnerships, which seems too broad and disconnected from the challenges and opportunities of the geography each partnership represents. The application lacks a clear case for how products developed at such a broad scale will help increase restoration and acquisition within each individual oak partnership.

Review Team Recommendation: Do Not Fund

Staff Recommendation: Do Not Fund

Amount: $0

Organizational Collaboration Application Evaluation

OVERVIEW

Project #: 223-8073

OWEB Region: 2

Applicant: Rogue River WC

Application Name: Rogue Drinking Water Partnership

Requested Amount: $61,116

Applicant's Summary

The Rogue Drinking Water Partnership (RDWP) is a coalition of drinking water providers that includes the Medford Water Commission, and the cities of Grants Pass and Rogue River, Shady Cove, and Ashland, and other local partners the Rogue River Watershed Council, Rogue Valley Council of Governments, Jackson Soil & Water Conservation District, Rogue Valley Sewer Services, and the local office of the Oregon Department of Environmental Quality. Our focus area is the middle and upper Rogue River Basin. The concept of source water protection strives to strike a balance between human use over time and watershed health by implementing actions that protect and enhance drinking water and ecological conditions. Protecting the quality and quantity of our drinking water resources for Rogue Basin communities serves public health interests and benefits nature.

The RDWP seeks OWEB support to build collaborative capacity to expand RDWP's effectiveness by investing in strategy development, increasing the partnership's geographic footprint, and building staff capacity for enhanced coordination. The RDWP will build upon previous work by developing an action plan framework for basin-wide source water protection, improving communication networks to share essential information, increasing outreach and education about drinking water to community members throughout the basin, planning collaborative efforts to implement high priority stream restoration projects which lead to improved water quality and more secure water quantity, and developing a water quality monitoring network. Increased capacity will allow RDWP to expand its network of drinking water providers, landowners, recreationists, agencies, conservation interests and others to heighten the awareness of source water protection, increase the amount of resources to protect source water, and draw attention to the benefits of protecting and restoring watersheds on the quantity and quality of source water.

REVIEW SUMMARY

Application strengths identified during review include:

- The application demonstrates broad community and local government support.
- The application demonstrated a clear plan for engaging tribal partners.
- The project partners have a good understanding of how increased organizational capacity could enhance their ability to implement restoration and acquisition projects within the collective geography. The restoration outcomes are linked to improving water quality, drinking water and climate resiliency.

- The project partners have the appropriate technical expertise to achieve the proposed outcomes.
- The lead organization, the Rogue River Watershed Council has a diverse project portfolio and a history of delivering sound project products.
- This is a strong partnership with a history of successful collaboration.

Application concerns identified during review include:

- The proposal plans to build the capacity of the Rogue River watershed Council to engage in this collaboration, but it will be challenging for the council with its current staffing workload to sustain engagement without increased staffing capacity.

Concluding Analysis

This proposal builds off the success of this partnership and is responsive to the local needs of the community. The proposal is linked to clearly defined partnership challenges and the outcomes of this work will support the goals of the partnership and lead to future restoration actions.

Review Team Recommendation: Fund

Staff Recommendation: Fund

Amount: $61,116

Organizational Collaboration Application Evaluation

OVERVIEW

Project #: 223-8074

OWEB Region: 3

Applicant: North Clackamas WC

Application Name: Shared Staffing: N. Clackamas and Greater Oregon City WCs

Requested Amount: $74,913

Applicant's Summary

The North Clackamas Watersheds Council and the Greater Oregon Watersheds Council, two small Councils poised for growth, propose to create a framework for sharing staffing to create efficiency, stronger project partnership, and better staff retention and organizational capacity to implement restoration at a larger scale.

The two Councils serve adjoining stretches of the lower Willamette Basin, encompassing numerous anadromous fish-bearing tributaries: Abernethy, Beaver, Parrot, Rinearson, Boardman, River Forest, Kellogg, and Mt. Scott Creeks. Their combined territories holds a population of 199,000, more than every city in Oregon except Portland.

The two organizations, which have similar projects, have submitted joint grant applications to OWEB and other funders, and both of which have part-time staff that are difficult to retain as part-time employees, will create a framework for shared staffing for (initially) watershed restoration and stakeholder engagement functions. The objective is to share staffing to create retention and efficiencies in planning and delivering similar restoration projects, magnifying stakeholder engagement, reducing replication, and addressing similar watershed issues.

Short-term outcomes of this proposal will be the creation and approval of a shared framework by both organizations, including but not limited to:
-Shared position descriptions (Watershed Restoration Manager, Stakeholder Engagement Coordinator)
-Workplans
-Budgets
-Timelines and Work Calendar
-Recruitment, Supervision, Communication, Technology, Performance Review, Personnel Handbook, & other framework elements
-Evaluation Plan
-Contingency Plan for foreseeable challenges
-Decision Making Matrix
-Joint sessions of Council's Board & Executive Committees to understand framework and sharing
-Legally vetted MOU approved by both Councils

REVIEW SUMMARY

Application strengths identified during review include:

- The partners have a clear understanding of how increased organizational capacity and a shared staffing structure will increase their ability to implement restoration and acquisition projects within the collective geography.
- The proposal demonstrates strong support from staff and board members of both organizations as well as a collective vision of the outcomes from this proposal.
- The organizations have been working together for several years, including through the Clackamas FIP, and this proposal is timely and aligns with other collaborative work the organizations are pursuing together.
- The budget aligns with the proposed deliverables and includes legal fees, which are an important consideration when developing a new agreement around shared staff.

Application concerns identified during review include:

- The partners have not identified a facilitator for the project, it will be important to select someone with experience in developing shared staffing models.
- Both organizations are small and are working collectively to build capacity to achieve restoration outcomes. It could be challenging for the individual executive directors to commit time to this important work; however, a successful outcome would add to the long-term capacity of the organizations.

Concluding Analysis

The two watershed councils working together on this proposal have a clear understanding of the opportunities that come with increased organizational collaboration. They have a collective vision of how a shared staffing model will increase their collective ability to achieve restoration outcomes in their watersheds.

Review Team Recommendation: Fund

Staff Recommendation: Fund

Amount: $74,913

Organizational Collaboration Application Evaluation

OVERVIEW

Project #: 223-8075

OWEB Region: 3

Applicant: Coast Fork Willamette WC

Application Name: Prioritization Collaboration with Tribal Partners in the U. Willamette

Requested Amount: $74,975

Applicant's Summary

This project will provide crucial support for the members of the Upper Willamette Stewardship Network (UWSN) to develop the underlying governance structures, protocols, and commitment to ensure engagement with Indigenous partners in a coordinated and responsible way. This critical step will lay the foundations for Native and Tribal communities' participation in voluntary and cooperative land management activities throughout the Upper Willamette. The work of building relationships and engaging Indigenous partners needs to be informed by careful consideration of past and present conditions. The UWSN has been working to build awareness collectively. We cannot embark on this work without clear structures and commitments in place protecting our Indigenous partners from the disappointments to which they have become accustomed after historical injustices.

This project will enable the UWSN to define our collective commitment and the protocols and guidelines essential to make sure we can be good partners to Indigenous people and Tribes. This process will take place with professional facilitation support and incorporate the advice of our Native Advisory Committee & Indigenous scholarship recipients. The outcomes will be to develop the internal structures for continuing our work in Tribal Partnerships & Decolonization, including determining the roles & responsibilities of the staff-led project team and Core Team in areas such as participation, communication, decision-making, and accountability.

The UWSN consists of six conservation organizations including: Coast Fork Willamette Watershed Council (CFWWC); Middle Fork Willamette Watershed Council (MFWWC); Long Tom Watershed Council (LTWC); McKenzie Watershed Council (MWC); McKenzie River Trust (MRT); and the Friends of Buford Park & Mt. Pisgah (Friends). We collaborate and with a wide range of partners to advance our mission to work with communities to care for land and water in the Upper Willamette.

REVIEW SUMMARY

Application strengths identified during review include:

- The partnering organizations have a history of successful collaboration, decision making structure, and are highly vested in this work through monthly decolonization trainings.
- The staff and contractors have the technical skills to achieve the proposed deliverables.
- The proposal includes a clear timeline, budget and deliverables.
- The partnering organizations have committed to learning and exploring decolonization.

Application concerns identified during review include:

- The application and supplemental materials do not demonstrate tribal commitment to this project.
- The application proposes to build capacity within the partnering organizations; however it seems that building capacity within the tribal partners may lead to more long-term capacity and to increased capacity to get work done on the ground.
- The application does not clearly describe how the outcomes of the organizational collaboration activities will advance the partnering organizations' relationship with tribes.
- This is a complex partnership with many moving parts and funding from several different OWEB programs. The outcomes of this specific proposal are vague and its like the partners need funding to keep the many pieces moving forward without any clear and specific outcome.

Concluding Analysis

The partnership is committed to collaboration and decolonization work within their collective geography as well as finding ways to meaningfully engage Native people in restoration and stewardship work. The mechanics for how the proposed outcomes of this organizational collaboration effort will be achieved and lead to specific eligible watershed restoration or acquisition projects or programs is not clear from the application. Capacity to do this work is important, but the application lacks a strong case for why the partners need to build capacity within the partnering organizations versus within the tribes they want to partner with.

Review Team Recommendation: Do Not Fund

Staff Recommendation: Do Not Fund

Amount: $0

Organizational Collaboration Application Evaluation

OVERVIEW

Project #: 223-8076

OWEB Region: 3

Applicant: Calapooia WC

Application Name: Mid-Willamette Beaver Partnership

Requested Amount: $73,700

Applicant's Summary

Beginning initially with Bonneville Environmental Foundation and the Luckiamute, North Santiam, and Marys River Watershed Councils, the Mid-Willamette Beaver Partnership (MWBP) has since expanded to also include the Calapooia and South Santiam Watershed Councils and representatives from the Natural Resource Departments of the Confederated Tribes of Grand Ronde and the Confederated Tribes of Siletz Indians. This growth has added complexity while also significantly expanding opportunity for on-the ground restoration impacts in the Mid-Willamette, encompassing the Calapooia, Luckiamute, Marys, North Santiam, and South Santiam watersheds.

Within this proposal, MWBP is seeking to strengthen the capacity of the collaborative to undertake regional restoration efforts by addressing some of these complexities.

One complexity – defining the partnership structure, decision-making strategies, and how organizations and tribal nations are represented – has become necessary to address as the collaborative has expanded in both geographic scope and in number of partners. Over the course of this proposed project, through a facilitated process, the partnership will answer some of these difficult questions that have arisen or may arise as the collaborative continues to grow to lay a solid foundation for beaver-centric restoration across the mid-Willamette.

Another complexity – the need for navigating questions around equity of and logistics within resource sharing among so many partners – has become more and more evident to address, particularly as the partnership is exploring opportunities for large-scale regional restoration opportunities. Resource sharing will likely continue to increase in complexity as the partnership expands, and within this proposal, MWBP seeks to address this complexity before issues could arise by developing detailed resource-sharing guidelines that clarify expectations and processes around shared funding.

REVIEW SUMMARY

Application strengths identified during review include:

- The proposal is timely and will support a growing partnership to engage additional partners and develop an organizational framework that engages and supports all members of the partnership.
- The proposal demonstrates support and engagement from appropriate partners.
- The partnership is working with a consultant that is experienced and has the necessary technical skills to support the work of the partnership.

- The product of this proposal will support future restoration actions by all partners.

Application concerns identified during review include:

- The proposal is ambitious, and the timeline provided in the application includes minimal details on implementation

Concluding Analysis

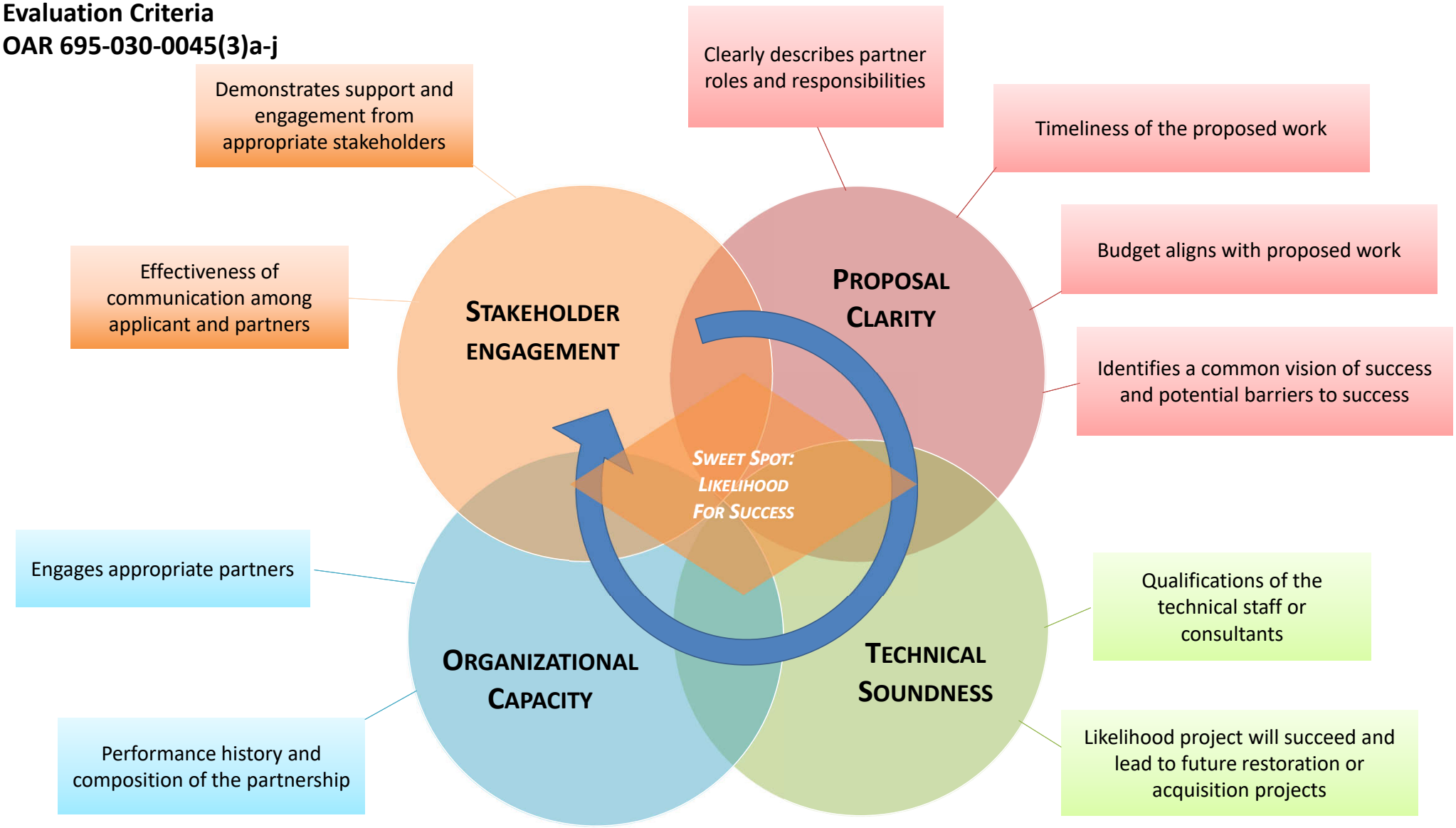
The Mid-Willamette Beaver Partnership fills a much-needed role in the Willamette Valley and the proposal addresses necessary partnership changes due to the addition of new partners. The partnership is engaging with the necessary partners and has the technical skills and resources to successfully achieve the proposed deliverables, which will directly support future restoration actions.

Review Team Recommendation: Fund

Staff Recommendation: Fund

Amount: $73,700

Organizational Collaboration Grant
Evaluation Criteria
OAR 695-030-0045(3)a-j



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Agenda Item N supports all of OWEB's Strategic Plan priorities.

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Stephanie Page, Deputy Director
Lisa Charpilloz Hanson, Executive Director

SUBJECT: Agenda Item N – 2023-2025 Agency Request Budget and Organizational Chart
July 26-27, 2022, Board Meeting

I. Introduction

At the April 26-27, 2022, board meeting, staff presented a summary of proposed policy option packages (POPs) for OWEB' 2023-2025 agency request budget. Since the April board meeting, staff have added more detail to the packages and added a package based on stakeholder and partner agency feedback. Staff also developed a proposed organizational chart showing existing and requested positions.

II. Budget Outreach and Engagement

Staff held two stakeholder outreach meetings on May 20 and 27, 2022 regarding OWEB's agency request budget. Staff also shared OWEB's proposed POPs with other state natural resource agency directors and staff.

Based on stakeholder and partner agency input, OWEB has added one more package to the POP list. This package would provide staffing resources to apply for and administer grants for funding opportunities that support OWEB's mission. These resources would build OWEB's capacity to pursue grant resources such as federal infrastructure funding.

III. Budget Proposals and Organization Chart for the 2023-2025 Biennium

The OWEB proposed 2023-2025 POP list is found in Attachment A. The packages focus on OWEB's agency structure and request the resources needed to continue existing work, launch new programs, and address board and state priorities. Board and state priorities addressed in the attached POP list include climate change, inclusive engagement, and protection of farm and ranch lands.

Existing and proposed OWEB organizational charts are also found in Attachment B and C, respectively. The proposed organizational chart shows five sections, each led by a manager. The Deputy Director would supervise the managers of the sections. This structure creates a sustainable workload for managers and allows the Executive Director to focus her time and attention on agency leadership and board engagement.

IV. Recommendation and Next Steps for Budget Development

Staff recommend the board approve the budget proposals included in Attachment A of this staff report for inclusion in OWEB's 2023-2025 Agency Request Budget.

Attachments

A. Draft Proposed Policy Option Packages for OWEB's 2023-25 Agency Request Budget
B. 2021-2023 OWEB Organization Chart
C. 2023-2025 Draft Proposed Organization Chart

2023-25 Agency Request Budget

2023-25 Significant Changes

Overview

- OWEB's policy packages focus on creating a sustainable organization structure to meet OWEB's needs; expanding coordination on climate and water-related work; expanding equity and inclusion efforts; providing natural resource grant administration capacity; stewardship of land and water acquisitions; and continuing new programs for disaster resiliency.
- The requested packages will provide OWEB the structure to effectively administer new and existing grant programs into the future. The packages will provide the resources to ensure compliance with federal and state program requirements, including requirements related to management of easements and land acquisitions. The packages will also support the mechanics of OWEB's grantmaking work with adequate information technology and business resources and help us comply with state data, IT and HR requirements.
- The requested packages address key state priorities, goals and objectives of OWEB's strategic plan, and OWEB's climate resolution.
- Priorities, goals, and objectives addressed include building non-traditional partnerships, identifying and funding projects with climate benefits, protecting working farms and ranches, building community and partner capacity, and supporting healthy, resilient watersheds.

Policy Packages - Grants Budget

200 - Standard Grant Program Continuity (FF/OF): This package includes the standard request to extend expenditure limitation for non-lottery fund grants that have been awarded and continue to be active (FF ($18M/OF ($600K) carry-forward

201 - Emergency response programs (GF): Continues grant programs to support post-fire restoration and recovery in 2020 and 2021 fire areas, and drought relief and resiliency in areas affected by the 2021 drought. Amount TBD based on estimated carryover.

215 - Ag Heritage Investment ($10M GF): Request an additional state investment for the Oregon Agricultural Heritage Program to support protection and stewardship of working farms and ranches for future generations and request continued expenditure limitation for funds appropriated through the GF in 2021-23 biennium ($5M) and deposited into the Oregon Agricultural Heritage Program account (OF).

245 - Water acquisition grant funds continuity (OF): Request continued expenditure limitation for funds appropriated through the GF in 2021-23 biennium ($10M) and deposited into the Flexible Incentive Account (OF) 280 - Additional OF limitation (OF): May request additional OF limitation to be able to receive and expend OF grant funds beyond current service level.

Policy Packages - Operations Budget (Total estimated costs: $8,295,000, 29 positions)

100 - Agency reorganization and capacity building: 2 positions are requested to be re-classified to management positions as part of establishing the future organization chart for OWEB. Estimated cost: $72,000 (9% FF, 91% LF)

101 - Special programs manager: 1 position is requested to lead special grants and initiatives, including but not limited to post-fire recovery and restoration and drought resiliency. Estimated cost: $387,000 (100% GF)

102 - Asset, Acquisition & Stewardship Manager 2: 1 permanent position is requested to lead the acquisitions (land and water) & stewardship work. Estimated cost: $368,000 (50% LF, 25% OF, 25% GF)

110 - Program Continuity: Requests to convert 3 limited duration Lottery Fund positions to permanent Lottery Fund positions and support water and climate work, measure conservation outcomes, and manage focused investment partnership grants. Estimated cost: $858,000 (100% LF)

115 - Ag Heritage Continuation Requests: Requests to convert 2.5 limited duration positions to 2.5 permanent Other Funds positions to operate the Oregon Ag Heritage Program, which received funding in the 2022 regular legislative session. Estimated cost: $800,000 (100% OF)

120 - Additional IT resources: Requests 2 positions to boost programming capacity, fulfill state information systems requirements such as the open data inventory and IT modernization initiative, provide business analysis, and serve as a liaison between program staff and development staff. Requests contracted services authority for business systems analysis to document existing systems. Estimated cost: $399,000 (50% LF, 25% GF, 25% OF)

125 - Partner Organization Technical Assistance: Requests 1 position to oversee technical assistance grants to local watershed restoration partners, support continuous improvement in partner organization operations, and build relationships with non-traditional partners. Estimated cost: $253,000 (100% LF)

130 - Internal audit services: Requests funding to conduct internal audits required by law and recommended in an audit by the Oregon Secretary of State's office. Estimated cost: $160,000 (25% LF, 25% GF, 25% FF, 25% OF)

135 - Board priorities: Requests 1 limited duration position to expand the agency's water and climate work, and 1 limited duration position to lead the agency's internal and external communications work, helping to expand equity and inclusion efforts and fulfilling the requirements of environmental justice legislation (HB 4077; 2022 regular session). Estimated cost: $578,000 (88% LF, 12% GF)

140 - Fiscal agent for grant resource coordination: Requests 2 limited duration positions to pursue and administer grant fund opportunities that support state enterprise-level natural resource priorities. Estimated cost: $610,000 (64% GF, 36% FF)

145 - Water Acquisitions Continuation: Requests to convert 1.5 limited duration position to 1.5 permanent positions to operate the water acquisitions program. Estimated cost: $383,000 (100% OF)

150 - Emergency response programs: Continues 8 limited duration positions to administer grants for post-fire restoration and recovery in 2020 and 2021 fire areas, and drought relief and resiliency in areas affected by the 2021 drought. Estimated cost: $2,242,000 (100% GF)

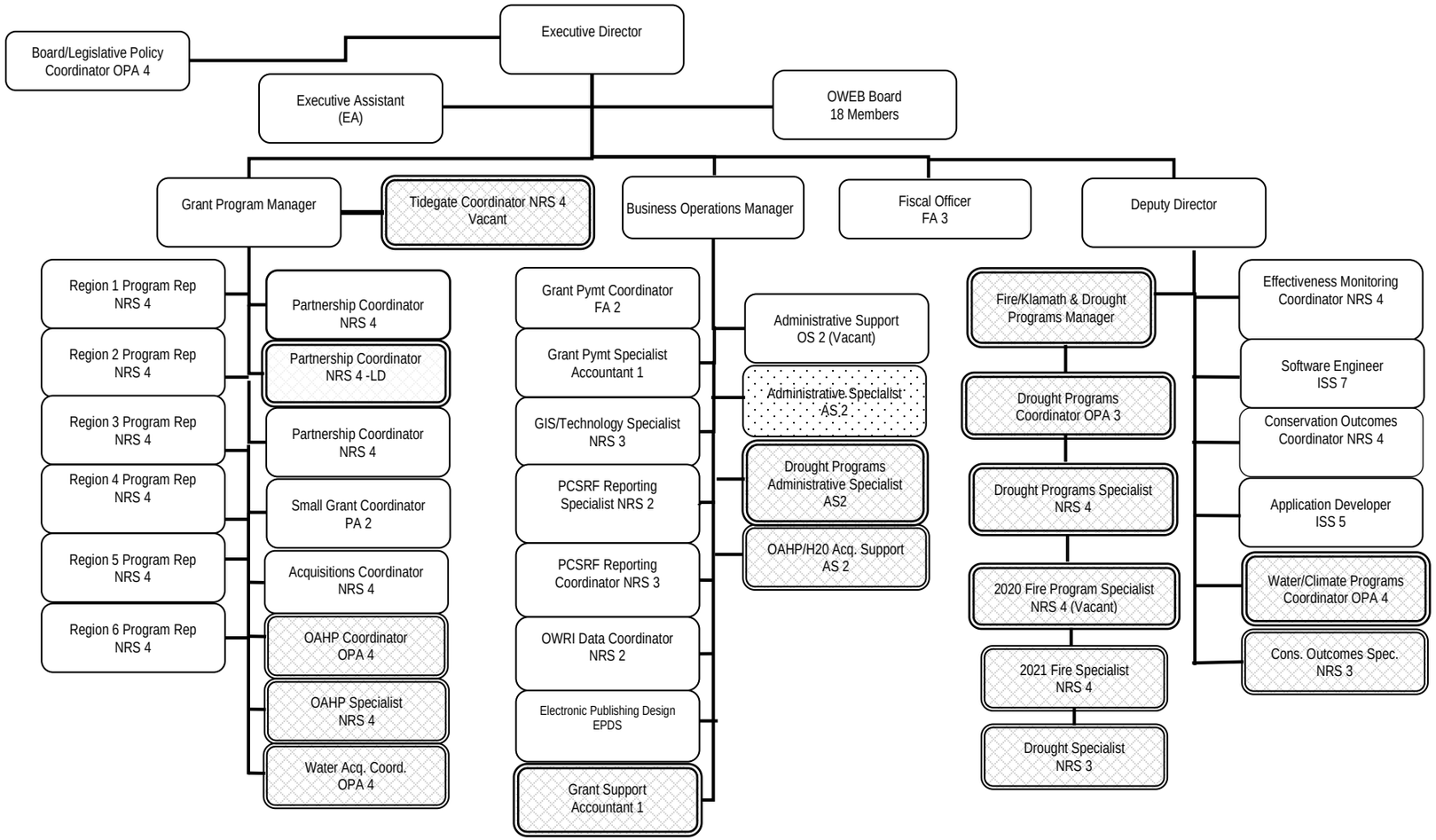
155 - Asset and Acquisition Stewardship: Requests two positions to coordinate and steward acquisitions of land and water and stewardship of assets, including those funded under the Oregon Ag Heritage Program as well as existing investments. Also requests contracted services to support acquisition monitoring. Estimated cost: $605,000 (100% GF)

160 - Program continuity: Requests to extend 1 limited duration Federal Fund position to support tide gate work. Estimated cost: $328,000 (100% FF)

165 - National Historic Preservation Act compliance: Requests a limited duration Federal Fund position to assure compliance with new National Historic Preservation Act requirements associated with Pacific Coast Salmon Recovery funding. Estimated cost: $252,000 (100% FF)

Fund Source key:
LF = Lottery Funds
FF = Federal Funds
GF = General Funds
OF = Other Funds

Oregon Watershed Enhancement Board Organizational Chart
2021-2023

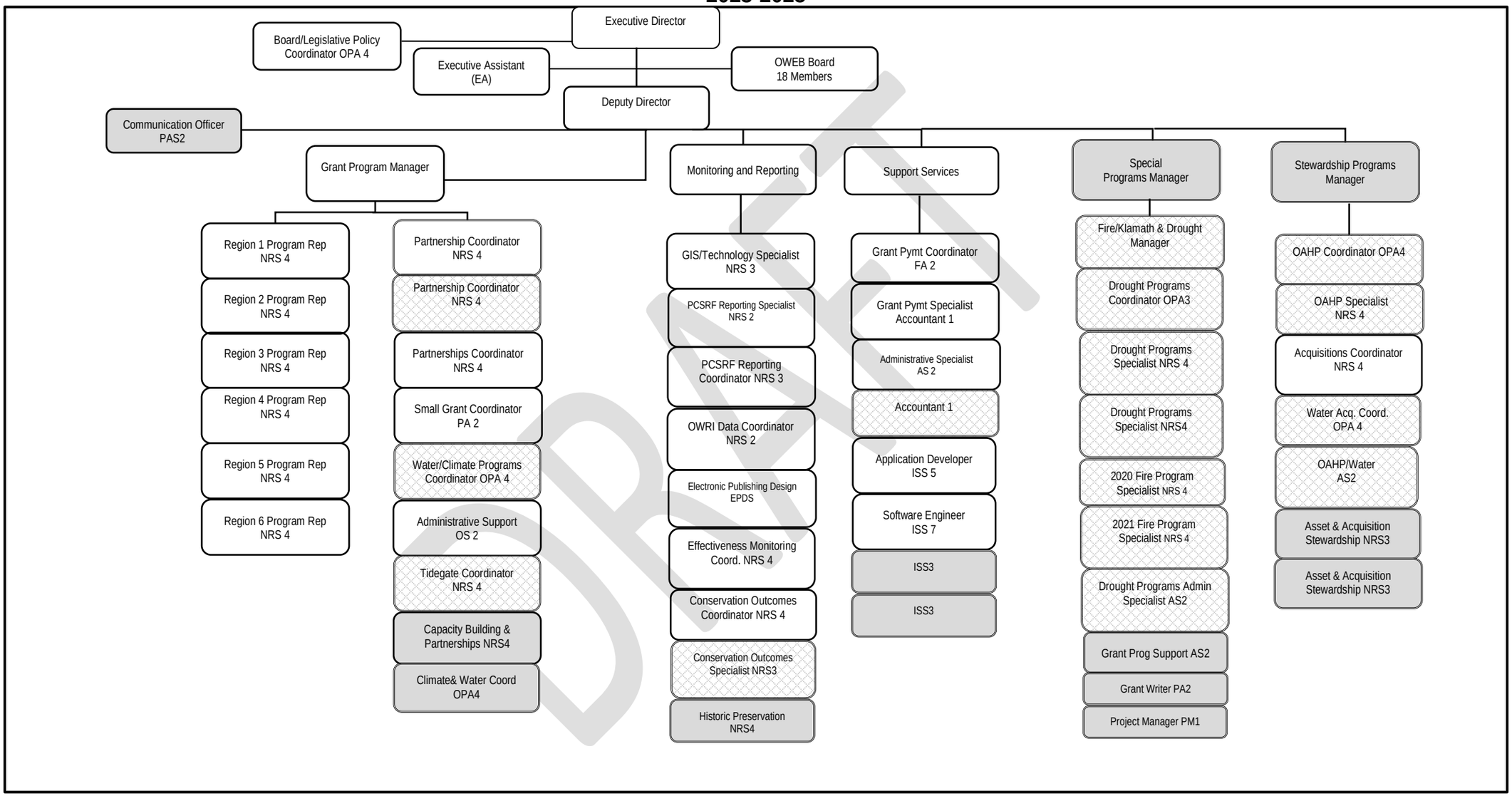


Position Reclassified | *Position Established* | *Limited Duration (LD)* | *Position Established/LD*

46 - FTE
46 - Positions

*Includes December 2022 Special Session Drought and February 2022 short session positions (Drought, Fire, OAHP, Water Acquisitions, Conservation Outcomes Specialist)

Oregon Watershed Enhancement Board Organizational Chart
2023-2025



Position Established/LD

New Position

30 – Permanent; 16 – 21/23 LD to continue; 13 – 23/25 new requested
59 – Positions total

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OREGON WATERSHED ENHANCEMENT BOARD

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Agenda Item O supports OWEB's Strategic Plan priority # 4: Watershed organizations have access to a diverse and stable funding portfolio.

MEMORANDUM

TO: Oregon Watershed Enhancement Board
FROM: Jillian McCarthy, Coastal Programs Coordinator
SUBJECT: Agenda Item O. Tide Gate Update and Accept Funds
July 26-27, 2022, Board Meeting

I. Introduction

This report requests that the board accept up to $70,000 of state lottery funding from the Oregon Business Development Department (OBDD) and delegate authority to the Executive Director to enter into agreements for tide gate technical studies that have a statewide benefit for tide gate project development.

II. Background

The Oregon Tide Gate Partnership ('Partnership') formed in September 2016 to address the growing challenge of aging tide gate infrastructure in coastal Oregon. The Partnership includes conservation and agriculture organizations, state, federal, and local agencies, counties, and landowners with the collective mission to support resilient coastal communities, protect landscapes that support local economies, and enhance the ecological function of estuarine resources for fish and wildlife. More information on the Partnership is available at https://oregontidegates.org/.

III. Tide Gate Funding

In the second 2020 legislative special session, OBDD received $3 million in state lottery funding to implement a Tide Gate Grant and Loan program. In addition to issuing grants and loans for tide gate planning and construction projects, Oregon Administrative Rule (OAR 123-046) allows for OBDD to use funds for technical studies that have a statewide benefit for tide gate project development.

After grant awards were made in the spring of 2021, $77,000 in funding remained in the Tide Gate Grant and Loan program, and OBDD requested that OWEB accept the funds to invest in the development of the Tide Gate Pipe-Sizing Tool. Phases one and two of the Tide Gate Pipe-Sizing Tool were funded by an OWEB technical assistance grant (220-8404-17508) under the Governor's Priority funding for Tide Gates.

At the January 2022 meeting, the OWEB Board approved acceptance of $77,000 from OBDD for phase three of the Tide Gate Pipe-Sizing Tool project, focusing on data refinement, increased functionality, and training.

In Spring 2022, the project team discussed the options to include multiple outlet systems, muted tidal regulator analysis, climate change, and groundwater flows in the model. These additions would significantly enhance the model. These additions are estimated to add $70,000 to the project cost. OBDD requested an amendment to the interagency agreement between OBDD and OWEB to add $70,000 for a total of $147,000 for phase three of the Pipe-Sizing Tool.

IV. Recommendation

Staff recommend that the board accept up to $70,000 of additional state lottery funding from OBDD and delegate authority to the Executive Director to enter into agreements to implement technical studies that have a statewide benefit for tide gate project development.