



OREGON  
**WATERSHED**  
ENHANCEMENT BOARD

**BOARD MEETING**  
**JANUARY 15-16, 2019**

**CANNON BEACH**



# Oregon Watershed Enhancement Board

## Meeting Agenda

### January 14-16, 2019

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#### **Monday, January 14, 2019**

##### ***Tour - 4:00p.m.***

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The board and OWEB staff will conduct a field tour of the Ecola Creek Forest Preserve. The tour will be leaving from the Surfsand Resort (address below). Anyone is welcome to join the tour, but please be prepared to provide your own transportation and be prepared for inclement weather.

#### **Tuesday, January 15, 2019**

Surfsand Resort  
Ocean View Ballroom  
148 W Gower Ave  
Cannon Beach, OR 97110

Directions: <https://goo.gl/maps/ddQkCYxsne32>

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##### **Business Meeting – 8:00 a.m.**

For each agenda item, the time listed is approximate. The board may also elect to take an item out of order in certain circumstances. During the public comment periods (Agenda Items F, I, M, and O), anyone wishing to speak to the board on specific agenda items is asked to fill out a comment request sheet (available at the information table). This helps the board know how many individuals would like to speak and to schedule accordingly. At the discretion of the board co-chairs, public comment for agenda items on which the board is taking action may be invited during that agenda item. ***The board encourages persons to limit comments to 3 to 5 minutes.*** Written comments will also be accepted on any item before the board. Written comments should be sent to Eric Hartstein at [Eric.Hartstein@oregon.gov](mailto:Eric.Hartstein@oregon.gov). Please note that written comments received after January 8, 2019 will not be provided to the board in advance of the meeting.

##### **A. Board Member Comments (8:05 a.m.)**

Board representatives from state and federal agencies will provide an update 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 (8:45 a.m.)**

The minutes of the October 16-17, 2018 meeting in Gold Beach will be presented for approval. *Action item.*

- C. Board Subcommittee Updates (8:50 a.m.)**  
Representatives from board subcommittees will provide *written* updates on subcommittee topics to the full board. *Information item.*
- D. Strategic Plan Update (8:50 a.m.)**  
Executive Director Meta Loftsgaarden will provide a report to the board on progress made on strategic plan implementation. *Information Item.*
- E. Director’s Update (8:55 a.m.)**  
Executive Director Meta Loftsgaarden will update the board on agency business and late-breaking issues. *Information item.*
- F. Public Comment (9:05 a.m.)**  
This time is reserved for general public comment, as well as other matters before the board.
- G. Intermountain West Joint Venture Water 4 Initiative (9:20 a.m.)**  
Natural Resources Conservation Service State Conservationist Ron Alvarado and Intermountain West Joint Venture Coordinator Dave Smith will provide a presentation on the Water 4 Initiative, which seeks to identify creative solutions regarding water use and conservation. *Information item.*
- H. Programmatic Effectiveness Monitoring Funding Requests and Updates (10:05 a.m.)**  
Deputy Director Renee Davis and Effectiveness Monitoring Coordinator Ken Fetcho will request the board provide funding for items related to effectiveness monitoring, including Conservation Reserve Enhancement Program performance tracking, Middle Fork John Day River Intensively Monitored Watershed monitoring, and the “Telling the Restoration Story” grant offering, along with updates on other effectiveness monitoring investments. *Action item.*
- I. Oregon Agricultural Heritage Program (OAHP) – Administrative Rules (10:35 a.m.)**  
***NOTE: Public Comment specific for this agenda item at approximately 10:50 a.m.***  
Executive Director Meta Loftsgaarden and Grant Program Manager Eric Williams will present Oregon Agricultural Heritage Commission reappointments and administrative rules for the OAHP for board consideration and approval, which will be preceded by public comment. Related to the administrative rules, because this item has already been the subject of formal public hearings and a comment period, further public testimony may not be taken except upon changes made to the item since the original public comment period, or upon the direct request of the board members in order to obtain additional information. *Action item.*
- J. Focused Investment Partnership (FIP) – Development Grant Awards (1:00 p.m.)**  
Capacity Programs Coordinator Courtney Shaff will provide an update on the FIP Development program and this grant solicitation offering, and request the board consider FIP Development grant awards. *Action item.*

**K. FIP Program – Implementation Initiatives Update (1:40 p.m.)**

Grant Program Manager Eric Williams, Partnerships Coordinator Andrew Dutterer, and Senior Policy Coordinator Eric Hartstein will provide an introduction to ongoing FIP Implementation initiatives. Representatives from each of the six initiatives will then update the board on progress made in the 2017-2019 biennium. *Information item.*

**L. Keystone Acquisition Project Transfer (4:40 p.m.)**

Grant Program Manager Eric Williams will lead the board in an initial discussion on the potential to transfer the Keystone Acquisition project to federal ownership. *Information item.*

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**Informal Reception – 5:30 p.m. - 6:30 p.m.**

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

Location:

Surfsand Resort

Ocean View Ballroom

148 W Gower Ave

Cannon Beach, OR 97110

Directions: <https://goo.gl/maps/ddQkCYxsne32>

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**Wednesday, January 16, 2019****Business Meeting - 8:00 a.m.**

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For each agenda item, the time listed is approximate. The board may also elect to take an item out of order in certain circumstances. During the public comment periods (Agenda Items F, I, M, and O), anyone wishing to speak to the board on specific agenda items is asked to fill out a comment request sheet (available at the information table). This helps the board know how many individuals would like to speak and to schedule accordingly. At the discretion of the board co-chairs, public comment for agenda items on which the board is taking action may be invited during that agenda item. ***The board encourages persons to limit comments to 3 to 5 minutes.*** Written comments will also be accepted on any item before the board. Written comments should be sent to Eric Hartstein at [Eric.Hartstein@oregon.gov](mailto:Eric.Hartstein@oregon.gov). Please note that written comments received after January 8, 2019 will not be provided to the board in advance of the meeting.

**M. Public Comment (8:00 a.m.)**

This time is reserved for general public comment, as well as other matters before the board.

**N. FIP Implementation 2017-2019 Action Items (8:15 a.m.)**

Partnerships Coordinator Andrew Dutterer and Senior Policy Coordinator Eric Hartstein will request the board carry-forward funds associated with the existing 2015-2017 Implementation FIP awards, and will also request the board approve a geography change to the Deschutes FIP initiative. *Action item.*

**O. FIP-Approval of New 2019-2021 Implementation Initiatives (8:30 a.m.)**

***NOTE: Public Comment specific for this agenda item at approximately 9:00 a.m.***

Grant Program Manager Eric Williams will brief the board on the 2019-2021 FIP Implementation solicitation process, which will be followed by public comment. Based on recommendations from the board Focused Investments subcommittee, the board will consider approval of new 2019-2021 FIP Implementation Initiatives. For selected initiatives, the board will also consider a small amount of funding to cover OWEB-required activities prior to July 2019 program implementation. *Action item.*

**P. 2019-2021 Spending Plan (11:15 a.m.)**

Executive Director Meta Loftsgaarden will lead the board through discussions around developing the 2019-2021 Spending Plan. *Information item.*

**Q. Fish Passage Grant Program (12:15 p.m.)**

Grant Program Manager Eric Williams will request the board approve adding funds to the interagency agreement between OWEB and the Oregon Department of Transportation for fish passage improvement grants. *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 on Monday, Tuesday, and Wednesday.

### 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 take action 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.

### Public Testimony

The board encourages public comment on any agenda item.

**General** public comment periods will be held on *Tuesday, January 15 at 9:05 a.m., and Wednesday, January 16 at 8:00 a.m.* for any matter before the board. Comments relating to a specific agenda item may be heard by the board as each agenda item is considered. People wishing to speak to the board are asked to fill out a comment request sheet (available at the information table). *The board encourages persons to limit comments to 3 to 5 minutes.* Written comments will also be accepted on any item before the board. Written comments should be sent to Eric Hartstein at [Eric.Hartstein@oregon.gov](mailto:Eric.Hartstein@oregon.gov). Please note that written comments received after *January 8, 2019* will not be provided to the board in advance of the meeting.

### Tour

The board may tour local watershed restoration project sites. The public is invited to attend, however transportation may be limited to board members and OWEB staff. Any person wishing to join the tour should have their own transportation.

**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 Darika Barnes, OWEB Board Assistant, at 503-986-0181 or send an e-mail to [darika.barnes@oregon.gov](mailto:darika.barnes@oregon.gov). If special physical, language, or other accommodations are needed for this meeting, please advise Darika Barnes as soon as possible, and at least 48 hours in advance of the meeting.

## Oregon Watershed Enhancement Board Membership

### Voting Members

Barbara Boyer, *Board of Agriculture*  
Molly Kile, *Environmental Quality Commission*  
Bruce Buckmaster, *Fish and Wildlife Commission*  
Vacant, *Board of Forestry*  
Meg Reeves, *Water Resources Commission*  
Jason Robison, *Public (tribal)*  
Gary Marshall, *Public*  
Will Neuhauser, *Board Co-Chair, Public*  
Randy Labbe, *Board Co-Chair, Public*  
Jan Lee, *Public*  
Liza Jane McAlister, *Public*

### Non-voting Members

Rosemary Furfey, *National Marine Fisheries Service*  
Stephen Brandt, *Oregon State University Extension Service*  
Debbie Hollen, *U.S. Forest Service*  
Kathy Stangl, *U.S. Bureau of Land Management*  
Ron Alvarado, *U.S. National Resource Conservation Service*  
Alan Henning, *U.S. Environmental Protection Agency*  
Paul Henson, *U.S. Fish and Wildlife Service*

### Contact Information

Oregon Watershed Enhancement Board  
775 Summer Street NE, Suite 360  
Salem, Oregon 97301-1290  
Tel: 503-986-0178  
Fax: 503-986-0199  
[www.oregon.gov/OWEB](http://www.oregon.gov/OWEB)

#### **OWEB Executive Director – Meta Loftsgaarden**

[meta.loftsgaarden@oregon.gov](mailto:meta.loftsgaarden@oregon.gov)

#### **OWEB Assistant to Executive Director and Board – Darika Barnes**

[darika.barnes@oregon.gov](mailto:darika.barnes@oregon.gov)

503-986-0181

### 2019 Board Meeting Schedule

January 14-16, in Cannon Beach  
April 16-17, in Salem  
July 16-17, in Klamath Falls  
October 15-16, in Condon

For online access to staff reports and other OWEB publications, visit our web site:

[www.oregon.gov/OWEB](http://www.oregon.gov/OWEB).



# Oregon Watershed Enhancement Board 2018 Strategic Plan, At A Glance

On behalf of the board members and staff of the Oregon Watershed Enhancement Board (OWEB), we invite you to review our 2018-2028 strategic plan. This plan celebrates all we have accomplished together over the last twenty years and sets a course for the next ten.

## Mission

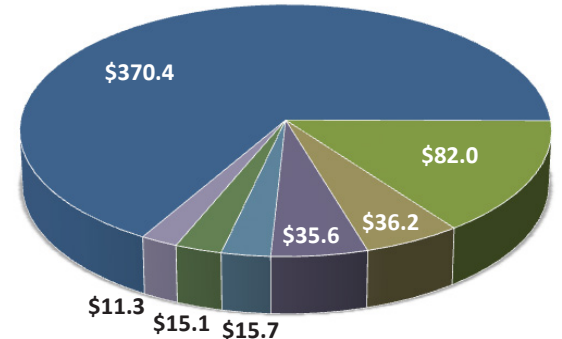
To help protect and restore healthy watersheds and natural habitats that support thriving communities and strong economies

## About OWEB

OWEB has funded more than 8,700 grants since 1999, with which Oregonians have restored more than 5,100 miles of streams and have made more than 6,100 miles of habitat accessible for fish. The grants have helped landowners improve more than 1,135,000 upland habitat acres and restore, improve, or create more than 51,000 wetland or estuarine habitat acres. The majority of the funds invested go directly to on-the-ground improvements of land and water, such as native plantings, dam removals, irrigation efficiencies, streams and rivers made accessible to fish, and land protected for future generations.

Our current investment portfolio – ranging from our flagship Open Solicitation grants to our newly established Organizational Collaboration grants – provides the foundation to improve the health of our watersheds by investing in people in our local communities.

Statewide Total Grants (All Fund Sources from 1999 to December 2017): \$566,268,983



Dollar amounts are in millions

Restoration & Acquisition ...	\$370.4 or 65.4%
Local Capacity .....	\$82.0 or 14.5%
Technical Assistance .....	\$36.2 or 6.4%
Monitoring .....	\$35.6 or 6.3%
Outreach & Education .....	\$15.7 or 2.8%
Research .....	\$15.1 or 2.7%
Assessment .....	\$11.3 or 2.0%



## Who We Are

### We are dedicated to the idea that...

- Healthy watersheds sustain healthy communities now and in the future.
- Every Oregonian plays a role in the health of our watersheds.
- It takes broad partnership to support resilient watersheds.
- The work to improve our watersheds requires we take the long view.

### Our work is in service to...

- Healthy, resilient watersheds (Ecological)
- Broad care and stewardship of watersheds by Oregonians (Social)
- Adaptive capacity of communities to support their watersheds (Community)
- Strengthened economies emerging from healthy watersheds (Economic)
- Strong and diverse partnerships that promote and sustain healthy watersheds (Sectoral)

### In all things, we will...

- Be bold
- Be open and transparent
- Consider future Oregonians
- Be curious

### Our work is characterized by...

- Involving stakeholders broadly and in partnership
- Using best available science supported by local knowledge
- Investing with long-term outcomes in mind
- Demonstrating impact through meaningful monitoring and evaluation
- Reaching and involving underrepresented populations



# Priorities & Strategies

With extensive input from our stakeholders, OWEB has designed a strategic plan to provide direction for the agency and its investments over the next 10 years.

## Priority 1

Broad awareness of the relationship between people and watersheds

### Strategies

- Develop and implement broad awareness campaigns and highlight personal stories to tell the economic, restoration, and community successes of watershed investments
- Increase involvement of non-traditional partners in strategic watershed approaches

## Priority 2

Leaders at all levels of watershed work reflect the diversity of Oregonians

### Strategies

- Listen, learn, and gather information about diverse populations
- Create new opportunities to expand the conservation table
- Develop funding strategies with a lens toward diversity, equity, and inclusion

## Priority 3

Community capacity and strategic partnerships achieve healthy watersheds

### Strategies

- Evaluate and identify lessons learned from OWEB's past capacity funding
- Champion best approaches to build organizational, community, and partnership capacity
- Continue to catalyze and increase state/federal agency participation in strategic partnerships

## Priority 4

Watershed organizations have access to a diverse and stable funding portfolio

### Strategies

- Increase coordination of public restoration investments and develop funding vision
- Seek alignment of common investment areas with private foundations
- Explore creative funding opportunities/partnerships with the private sector
- Partner to design strategies for complex conservation issues that can only be solved by seeking new and creative funding sources

## Priority 5

The value of working lands is fully integrated into watershed health

### Strategies

- Implement the Oregon Agricultural Heritage Program
- Strengthen engagement with a broad base of landowners
- Enhance the work of partners to increase working lands projects on farms, ranches, and forestlands
- Support technical assistance to work with owners/managers of working lands
- Develop engagement strategies for owners/managers of working lands who may not currently work with local organizations

## Priority 6

Coordinated monitoring and shared learning to advance watershed restoration effectiveness

### Strategies

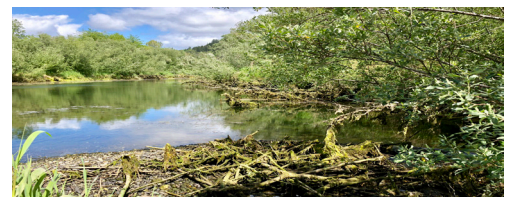
- Broadly communicate restoration outcomes and impacts
- Invest in monitoring over the long term
- Develop guidance and technical support for monitoring
- Increase communication between and among scientists and practitioners
- Define monitoring priorities
- Develop and promote a monitoring framework

## Priority 7

Bold and innovative actions to achieve health in Oregon's watersheds

### Strategies

- Invest in landscape restoration over the long-term
- Develop investment approaches in conservation that support healthy communities and strong economies
- Foster experimentation that aligns with OWEB's mission





# OWEB Strategic Direction and Principles

**OWEB** **OWEB's Mission:** To help protect and restore healthy watersheds and natural habitats that support thriving communities and strong economies.

## Goals

### Goals from OWEB's 2010 Strategic Plan

In 2010, the OWEB Board approved a strategic plan with five goals. With the passage of Constitutional Measure 76 and permanent Lottery funding, the Board continues to operate under the strategy.

#### **Goal 1: Adaptive Investment**

Restore and sustain resilient ecosystems through program and project investments that enhance watershed and ecosystem functions and processes and support community needs.

#### **Goal 2: Local Infrastructure Development**

Support an enduring, high capacity local infrastructure for conducting watershed and habitat restoration and conservation.

#### **Goal 3: Public Awareness and Involvement**

Provide information to help Oregonians understand the need for and engage in activities that support healthy watersheds.

#### **Goal 4: Partnership Development**

Build and maintain strong partnerships with local, state, tribal, and federal agencies, nonprofit organizations, and private landowners for watershed and habitat restoration and conservation.

#### **Goal 5: Efficient and Accountable Administration**

Ensure efficient and accountable administration of all investments.

## Long-Term Investment Strategy

### OWEB's Framework for Grant Investments

In 2013, the Board adopted a Long-Term Investment Strategy that guides its investments of Lottery, federal and salmon plate funding. All of OWEB's investments in ecological outcomes also help build communities and support the local economy. The Board also approved a direction for the investments outlined below. They will continue operating capacity and open solicitation grants and continue focused investments with a gradual increase over time.

#### **Operating Capacity**

Operating Capacity Investments support the operating costs of effective watershed councils and soil and water conservation districts. Councils and districts are specifically identified in OWEB's statutes.

#### **Open Solicitation**

OWEB offers responsive grants across the state for competitive proposals based on local ecological priorities.

#### **Focused Investments**

OWEB helps landscape-scale collaborative partnerships achieve collaboratively prioritized ecological outcomes.

#### **Effectiveness Monitoring**

OWEB evaluates and reports on the progress and outcomes of watershed work it supports.



**OWEB**

## Guiding Principles

### Guiding Principles

As the Board developed the Investment Strategy, they did so under established principles for how any changes in OWEB's programs would operate.

**Build on accomplishments.** The commitment and work of our local partners have resulted in a nationally and internationally recognized approach with unmatched environmental accomplishments. OWEB will build on this foundation.

**Effective communication.** OWEB is committed to active, two-way communication of ideas, priorities, and results with its staff, partners, potential partners, and the public as a means for developing and maintaining a strong investment strategy and successful cooperative conservation.

**Transparency.** OWEB values transparency and develops its Long-Term Investment Strategy through an open, transparent process that involves input and dialogue with stakeholders and staff.

**Maximize service, minimize disruption.** The Board considers how OWEB's grant portfolio impacts partner organizations and staff resources to maximize effectiveness without adversely affecting service delivery.

**Responsive.** The Long-Term Investment Strategy will adjust to changes in revenue and be responsive to changes in ecological priorities from the Governor, Legislature, the Board, and local partners.

**Adapt based on monitoring and evaluation.** OWEB's staff and Board monitor and evaluate the effectiveness and implementation of the Long-Term Investment Strategy. The Board shall adapt and modify the strategy as needed to meet its desired goals and outcomes and to improve overall investment success.

**Phase-in Change.** OWEB's Long-Term Investment Strategy will guide future efforts, is designed to accommodate changes and adjustments made by stakeholders and OWEB staff, and will be periodically revisited.

## Operating Principles

### Operating Principles to Enhance OWEB Team Work

We will do all we can, individually and as a group, to:

- **Use Good communication--at all levels and in all directions;**
- **Operate with a Team approach;**
- **Follow through on conversations in order to build and maintain needed trust;**
- **Empower staff wherever it is appropriate to do so; and**
- **Have fun while doing important work!**



# OWEB 2017-19 Spending Plan for the January Board Meeting

	OWEB SPENDING PLAN	Jan 19 additions	Spending Plan as of Jan 2019	TOTAL Board Awards To-Date	Remaining Spending Plan after To-Date Awards	Jan 2019 Proposed Awards	Remaining Spending Plan after Jan 2019 awards
1	<b>Open Solicitation:</b>						
2	Restoration (includes USFW Coastal Wetlands)		33.000	25.032	7.968		7.968
3	Technical Assistance						
4	Restoration TA		4.000	2.636	1.364		1.364
5	CREP TA (includes NRCS & ODF funds)		1.435	1.435	0.000		0.000
6	Stakeholder Engagement		0.700	0.632	0.068		0.068
7	Monitoring grants		3.100	1.784	1.316		1.316
8	Land and Water Acquisition						
9	Acquisition (includes USFW Coastal Wetlands)		9.900	6.630	3.270		3.270
10	Acquisition Technical Assistance		0.600	0.150	0.450		0.450
11	Weed Grants		3.000	3.000	0.000		0.000
12	Small Grants		3.150	3.150	0.000		0.000
13	Programmatic Effectiveness Monitoring		1.587	0.556	1.031	0.200	0.831
14	<b>TOTAL</b>	<b>0.000</b>	<b>60.472</b>	<b>45.005</b>	<b>15.467</b>	<b>0.200</b>	<b>15.267</b>
15	<b>% of assumed Total Budget</b>		<b>62.43%</b>				
16	<b>Focused Investments:</b>						
17	Deschutes		4.000	4.000	0.000		0.000
18	Willamette Mainstem Anchor Habitat		2.445	2.445	0.000		0.000
19	Harney Basin Wetlands		1.970	1.970	0.000		0.000
20	Sage Grouse		2.355	2.355	0.000		0.000
21	Ashland Forest All-Lands		2.340	2.340	0.000		0.000
22	Upper Grande Ronde		2.417	2.417	0.000		0.000
23	Development FIPs		1.150	0.572	0.578	0.344	0.234
24	FI Effectiveness Monitoring		0.750	0.750	0.000		0.000
25	<b>TOTAL</b>	<b>0.000</b>	<b>17.427</b>	<b>16.849</b>	<b>0.578</b>	<b>0.344</b>	<b>0.234</b>
26	<b>% of assumed Total Budget</b>		<b>17.99%</b>				
27	<b>Operating Capacity:</b>						
28	Capacity grants (WC/SWCD) incl. NRCS+LCWC		14.598	14.598	0.000		0.000
29	Statewide org partnership support		0.500	0.500	0.000		0.000
30	Organizational Collaborative Grants		0.400	0.400	0.000		0.000
31	<b>TOTAL</b>	<b>0.000</b>	<b>15.498</b>	<b>15.498</b>	<b>0.000</b>	<b>0.000</b>	<b>0.000</b>
32	<b>% of assumed Total Budget</b>		<b>16.00%</b>				
33	<b>Other:</b>						
34	CREP		0.750	0.750	0.000		0.000
35	Governor's Priorities		1.011	1.011	0.000		0.000
36	Strategic Implementation Areas		1.200	1.200	0.000		0.000
37	Strategic Plan Implementation Grants		0.500	0.500	0.000		0.000
38	<b>TOTAL</b>	<b>0.000</b>	<b>3.461</b>	<b>3.461</b>	<b>0.000</b>	<b>0.000</b>	<b>0.000</b>
39	<b>% of assumed Total Budget</b>		<b>3.57%</b>				
40	<b>TOTAL OWEB Spending Plan</b>	<b>0.000</b>	<b>96.858</b>	<b>80.813</b>	<b>16.045</b>	<b>0.544</b>	<b>15.501</b>
41	<b>OTHER DISTRIBUTED FUNDS IN ADDITION TO SPENDING PLAN DISTRIBUTION</b>						
42	Oregon Department of Fish and Wildlife - PCSRF		10.450	10.450	0.000		0.000
43	Lower Columbia Estuary Partnership		0.309	0.309	0.000		0.000
44	Forest Health Collaboratives from ODF		0.500	0.500	0.000		0.000
45	PSMFC-IMW		0.729	0.729	0.000		0.000
46	PSMFC-Coho Habitat Tools		0.166	0.166	0.000		0.000
52	ODOT	0.250	0.250	0.000	0.250	0.250	0.000
47	<b>TOTAL</b>	<b>0.250</b>	<b>12.404</b>	<b>12.154</b>	<b>0.250</b>	<b>0.250</b>	<b>0.000</b>
48	<b>TOTAL Including OWEB Spending Plan and Other Distributed Funds</b>	<b>0.250</b>	<b>109.262</b>	<b>92.967</b>	<b>16.295</b>	<b>0.794</b>	<b>15.501</b>

**MINUTES ARE NOT FINAL UNTIL APPROVED BY THE BOARD**

**Oregon Watershed Enhancement Board (OWEB)**

**October 16, 2018 Board Meeting**

Curry Public Library  
94341 3<sup>rd</sup> Street  
Gold Beach, OR 97444

MINUTES: Some agenda items are discussed out of order.

(Audio time stamps reference recording at: <https://youtu.be/jLS2JsaMp3M>).

**OWEB MEMBERS PRESENT**

Alvarado, Ron  
Brandt, Stephen  
Furfey, Rosemary  
Henning, Alan  
Henson, Paul  
Kile, Molly  
Marshall, Gary  
Masterson, Laura  
McAlister, Liza Jane  
Neuhauser, Will  
Reeves, Meg  
Robison, Jason

**ABSENT**

Buckmaster, Bruce  
Hollen, Debbie  
Labbe, Randy  
Lee, Jan  
Stangl, Kathy

**VACANT**

Board of Forestry

**OWEB STAFF PRESENT**

Appel, Lisa  
Barnes, Darika  
Ciannella, Greg  
Davis, Renee  
Fetcho, Ken  
Greer, Sue  
Grenbemer, Mark  
Hartstein, Eric  
Loftsgaarden, Meta  
Redon, Liz  
Shaff, Courtney  
Williams, Eric

**OTHERS PRESENT**

Beamer, Kelley  
Beeken, Max  
Brooks, Perry  
Colby, John  
Coordes, Regan  
Desmond, Jim  
Dunne, Mel  
Freitas, Anna  
Gall, Ivan  
Gilbert, Amanda  
Harper, Drew  
Klock, Clair  
Lutz, Haley  
Preeg-Riggsby, Terri  
Purpura, Holly  
Siebert, Paul  
Timchak, Kelly  
Wahl, Mary  
Weber, Gregory

The meeting was called to order at 8:00 a.m. by Co-Chair Will Neuhauser. In the absence of Co-Chair Randy Labbe, OWEB Board Member Jason Robison accepted co-chair responsibilities for this meeting.

**A. Board Member Comments (Audio = 0:01:15)**

Board members provided updates on issues and activities related to their respective geographic regions and/or from the state and federal natural resource agencies they represent.

**B. Review and Approval of June Meeting Minutes (Audio = 0:44:40)**

The minutes of the June 27, 2018 meeting in Cascade Locks were presented to the board for approval.

Co-Chair Will Neuhauser moved the board approve the minutes from the June 27, 2018 meeting in Cascade Locks. The motion was seconded by Laura Masterson. The motion passed unanimously. (Audio = 0:45:55)

**C. Board Subcommittee Updates (Audio = 0:47:00)**

Representatives from the Monitoring, Focused Investments, and Operating Capacity subcommittees provided updates to the full board on current subcommittee topics and activities.

**D. Public Comment (Audio = 0:58:10)**

There was no public comment.

**E. Council Capacity Grants Guidance (Audio = 0:58:25)**

Capacity Programs Coordinator Courtney Shaff presented a review of the staff-proposed revisions to OWEB's Council Capacity Grants guidance document. Shaff requested board action to approve those revisions.

Co-Chair Jason Robison moved the board approve the changes to the 2019-2021 council capacity grant program and guidance document as described in Attachment B to the Council Capacity Grant Guidance Updates staff report. The motion was second by Gary Marshall. The motion passed unanimously. (Audio = 1:14:55)

**F. Spring 2018 Open Solicitation Grant Offering (Audio = 1:15:30)**

Grant Program Manager Eric Williams and OWEB's Regional Program Representatives presented the Spring 2018 Open Solicitation Grant Offering. Williams provided a summary of the project application review process and evaluation criteria, a summary of projects submitted and recommended, and other additional information on the grant offering, including projects proposed for Salmon License Plate funding. Each of the Program Representatives highlighted a project from their region that demonstrated excellence in meeting the evaluation criteria.

Due to the absence of a quorum for awarding grant funds, no motion was offered. Voting board members present indicated unanimous support to approve the staff funding recommendations as described in Attachment D to the Spring 2018 Open Solicitation Grant Offering. A vote will be held during a conference call scheduled for Friday, October 19 at 11:00 a.m. when a quorum of the board members can be present. (Audio = 3:00:00)

**P. Director's Update (Audio = 3:02:10)**

**P-1: OWEB 20th Anniversary**

Capacity Programs Coordinator Courtney Shaff briefed the board about OWEB's 20<sup>th</sup> anniversary promotions that are being coordinated with Oregon Lottery throughout 2019, including a television commercial, billboards, and a landing page on the Lottery website which highlights its beneficiaries to demonstrate the impact of Lottery revenues. Shaff presented the commercial and some project videos from the website. She also discussed some of the events being organized for the board, staff, and stakeholders to celebrate the 20<sup>th</sup> anniversary over the

next year at board meetings and around the state. Member Molly Kile suggested inviting restoration workers to come and celebrate at the Capitol.

Executive Director Meta Loftsgaarden asked the board members to view and share these videos and then provided a brief update on OWEB's new logo, which will be launched in 2019.

**P-6: Salmon License Plates (Audio = 3:41:00)**

Executive Director Meta Loftsgaarden informed the board that OWEB and Oregon Parks and Recreation Department will be working with the Oregon Department of Transportation's Department of Motor Vehicles and the Oregon Lottery to develop and promote a new design for the 20-year-old salmon license plate. Loftsgaarden said she will keep the board informed of progress on this project at the next two board meetings, and will request an endorsement in July from the board and in September from the Parks Commission, with a public campaign to launch the plates in October and November.

**P-2: OAHP Update (Audio = 3:48:55)**

Grant Program Manager Eric Williams updated the board on the work of the Oregon Agricultural Heritage Commission since the June board meeting, which included rulemaking activities and a solicitation for letters of interest from eligible organizations who have viable conservation easement or covenant grant projects that could apply for funding under the draft proposed rules. Williams reviewed OWEB's budget request for the Oregon Agricultural Heritage Program and the next steps for the commission.

**P-3: Annual Performance Progress Report (APPR) (Audio = 3:55:25)**

Deputy Director Renee Davis provided an overview of OWEB's APPR to the Oregon Legislature and the 12 Key Performance Measures that indicate the agency's performance and outcomes compared with its targets.

**P-4: Online Systems (Audio = 4:07:15)**

Deputy Director Renee Davis updated the board about OWEB's online grant application system and described the extensive improvements that have been made to the system's functionality during the last year.

**G. Board Discussion with Oregon Water Resources Department (Audio = 4:15:30)**

Grant Program Manager Eric Williams and Oregon Water Resources Department Field Services Division Administrator Ivan Gall addressed the board on legal options available for protecting water instream, including water measurement, water leasing, forbearance agreements, and permanent instream transfers.

**H. Strategic Plan Update (Audio = 5:13:45)**

Executive Director Meta Loftsgaarden reported to the board on progress made on strategic plan implementation and a broad overview of how staff will communicate on this issue going forward.

**H-1: Tracking and Staff Capacity (Audio = 5:14:30)**

Executive Director Meta Loftsgaarden walked the board through a template developed by staff to track quarterly progress on each of the eight strategic plan priorities and asked for board feedback on the structure and content.

**H-2: Board Subcommittees (Audio = 5:36:30)**

Executive Director Meta Loftsgaarden discussed how staff and board would like to establish regular check-ins with board subcommittees at their meetings for strategic plan priorities that are within their purview, with some overlap among committees, to continue to push and monitor progress in implementing OWEB's strategic plan.

**I. Secure, Safe, and Resilient Water Future (Audio = 5:46:00)**

Deputy Director Renee Davis updated the board on the Governor's emerging state initiative to ensure resiliency in water systems across the state with a 100-year vision. Davis explained her involvement on the Core Team—a deputy-level roundtable previously created in the early years of the Oregon Plan for Salmon and Watersheds—to further develop the water vision and continue work on the inventory of built and natural infrastructure and water assets, Director Loftsgaarden's leadership role in this initiative, and how the effort connects to OWEB's strategic plan.

# Oregon Watershed Enhancement Board (OWEB)

## October 17, 2018 Board Meeting

Curry Public Library  
94341 3<sup>rd</sup> Street  
Gold Beach, OR 97444

MINUTES: Some agenda items are discussed out of order.

(Audio time stamps reference recording at: <https://youtu.be/9MwQeHxdiUs>).

### **OWEB MEMBERS PRESENT**

Alvarado, Ron  
Brandt, Stephen  
Furfey, Rosemary  
Henning, Alan  
Henson, Paul  
Kile, Molly  
Marshall, Gary  
Masterson, Laura  
McAlister, Liza Jane  
Neuhauser, Will  
Reeves, Meg  
Robison, Jason

### **OWEB STAFF PRESENT**

Appel, Lisa  
Barnes, Darika  
Davis, Renee  
Fetcho, Ken  
Greer, Sue  
Hartstein, Eric  
Loftsgaarden, Meta  
Redon, Liz  
Shaff, Courtney  
Williams, Eric

### **OTHERS PRESENT**

Beamer, Kelley  
Boyer, Barbara  
Coordes, Regan  
Freitas, Anna  
Klock, Clair  
Minster, Erin  
Ojua, Larry  
Schmierer, Ann  
Swanson, Matt  
Timchak, Kelly

### **ABSENT**

Buckmaster, Bruce  
Hollen, Debbie  
Labbe, Randy  
Lee, Jan  
Stangl, Kathy

### **VACANT**

Board of Forestry

### **J. 2019-2021 Spending Plan (Audio = 0:01:15)**

Executive Director Meta Loftsgaarden led the board through initial discussions around developing the 2019-2021 Spending Plan, and initiated a conversation with the board about the tie between the spending plan and OWEB's 2018 strategic plan.

### **K. Public Comment (Audio = 1:05:45)**

The board was addressed by Clair Klock from Klock Farm and the Clackamas Soil and Water Conservation District to promote clean ground water and surface water in uplands area projects and to support the Governor's concept of the 100-year Water Vision.

The board was also addressed by Erin Minster from the Curry Soil and Water Conservation District and Curry Watershed Partnership, who came to thank the board for their support of the Oregon State Weed Board program.

**L. Land Acquisitions (Audio = 1:13:20)**

Grant Program Manager Eric Williams brought before the board a request to transfer ownership of two parcels of land in Yamhill County, known as the Yamhill Oaks Preserve, which were acquired through past Land Acquisition grant awards, from ownership by The Nature Conservancy (TNC) to ownership by the Yamhill Soil and Water Conservation District (SWCD). Williams also asked the board to consider an extension of the grant agreement associated with the Botts Marsh acquisition project.

**Public Comment:**

Jim Desmond, executive director for TNC in Oregon, came before the board to support approval for the conveyance of Yamhill Oaks Preserve from TNC to Yamhill SWCD. Desmond said TNC will also transfer funds in a stewardship endowment for the property to Yamhill SWCD.

Larry Ojua from the Yamhill SWCD also voiced approval for the conveyance of Yamhill Oaks Preserve from TNC to Yamhill SWCD and discussed the integrity of the operations, staff, board, and future of the Yamhill SWCD, which was endorsed in an organizational capacity review by OWEB staff. Barbara Boyer, chair of the SWCD board, also voiced her support for the conveyance of Yamhill Oaks Preserve from TNC to Yamhill SWCD

Co-Chair Will Neuhauser moved the board extend the closing deadline to October 31, 2019 for the Botts Marsh project (OWEB grant # 217-9901), with all other conditions of the project to remain unchanged. The motion was seconded by Meg Reeves. The motion passed unanimously. (Audio = 1:40:40)

Laura Masterson moved the board approve conveyance of the Yamhill Oaks Preserve (OWEB grant #208-108 and #212-108) from The Nature Conservancy to the Yamhill Soil and Water Conservation District, conditioned on staff and Department of Justice approval of the final form of all conveyance-related documents. The motion was seconded by Co-Chair Will Neuhauser. The motion passed unanimously. (Audio = 1:53:20)

**M. Tide Gates Programs (Audio = 1:54:30)**

Deputy Director Renee Davis provided a framework for the agenda item.

**M-1: Tide Gate Partnership (Audio = 1:57:45)**

Executive Director Meta Loftsgaarden explained the Tide Gate Partnership and updated the board on the partnership's activities. She briefly highlighted the items the partnership is working on, and how they connect directly and indirectly to the work of OWEB.

**M-2: Follow up From the Tide Gate Literature Review (Audio = 2:08:10)**

Deputy Director Renee Davis and Effectiveness Monitoring Coordinator Ken Fetcho reminded the board about the findings and recommendations from a recent literature review of tide gate restoration projects by Oregon State University. They then presented next steps for communicating key findings and considerations of the review to landowners, restoration practitioners, review teams, and partner organizations working on tide gates and increasing understanding about the results and outcomes of tide gate investments.

**N. Conservation Partnership Funding Request (Audio = 2:40:35)**

Capacity Programs Coordinator Courtney Shaff reviewed for the board the Oregon Conservation Partnership's (Partnership) accomplishments to date for the biennium. The Partnership includes The Network of Oregon Watershed Councils (NOWC), Oregon Association of Conservation Districts (OACD), Coalition of Oregon Land Trusts (COLT), and Oregon Conservation Education & Assistance Network (OCEAN). These separate organizations collaborate with the assistance of OWEB funding to deliver technical support, member services, program development, training, and outreach to their stakeholders who are largely OWEB grantees. Shaff recommended the board approve funding the \$50,000 remainder of the Partnership's biennial grant.

**Public Comment: (Audio = 2:43:50)**

Kelley Beamer from COLT, Kelly Timchak from NOWC, Terry Preeg Riggsby from OCEAN, and Anna Freitas from OACD came before the board to provide an overview of the partnership and how the organizations work together to support their request for the \$50,000 remainder of the Partnership's biennial grant.

Due to the absence of a quorum for awarding grant funds, no motion was offered. Voting board members present indicated unanimous support to award an additional \$50,000 to the Conservation Partnership in OWEB grant #218-8006-15907, for a total award of \$500,000 for the biennium. A vote will be held during a conference call scheduled for Friday, October 19 at 11:00 a.m. when a quorum of the board members can be present. (Audio = 3:01:50)

**O. Governor's Priorities (Audio = 3:02:25)**

Grant Program Manager Eric Williams and Senior Policy Coordinator Eric Hartstein requested the board provide Governor's Priority funding for post-fire technical assistance.

**O-1: Governor's Priorities – Post Fire Response (Audio = 3:02:50)**

Senior Policy Coordinator Eric Hartstein requested the board provide up to \$60,000 in Governor's Priority funding for post-fire technical assistance in north-central Oregon counties impacted by an extreme fire season.

**O-2: Governor's Priorities – Post Fire Response in Wasco County (Audio = 3:12:08)**

Grant Program Manager Eric Williams requested the board provide an emergency bridge loan to the Wasco County Soil and Water Conservation District, to be reimbursed by the Natural Resources Conservation Service for post-fire technical assistance

Due to the absence of a quorum for awarding grant funds, no motion was offered. Voting board members present indicated unanimous support to delegate authority to the Executive Director to enter into grant agreements to implement technical assistance activities to identify and develop responses to immediate watershed health needs caused by the north-central Oregon fires on private lands in an amount not to exceed \$60,000, to be taken from the Governor's Priorities line item in the 2017-19 spending plan. A vote will be held during a conference call scheduled for Friday, October 19 at 11:00 a.m. when a quorum of the board members can be present. (Audio = 3:18:30)

Board members present also indicated unanimous support to add \$10,000 of recaptured funds to the Governor's Priority line item of the 2017-2019 spending plan, and delegate authority to the Executive Director to enter into a grant agreement with Wasco SWCD to



cover fees, closing costs, and interest on a loan to implement post-fire restoration, in an amount not to exceed \$10,000, to be taken from the Governor's Priorities line item in the spending plan. A vote will be held during a conference call scheduled for Friday, October 19 at 11:00 a.m. when a quorum of the board members can be present. (Audio = 3:19:10)

**P. Director's Update (Audio = 3:19:50)**

**P-5: Programmatic Effectiveness Monitoring – "Telling the Restoration Story"**

Deputy Director Renee Davis presented information about the current status of a new grant offering intended to help OWEB and grantees better communicate data findings and outcomes from investments in various types of restoration. Davis talked about the restoration stories in progress and expectations around the next steps for issuing grant agreements this fall and completed products in 2019.

**Q. Other Business (Audio = 3:30:15)**

The board co-chairs will respond to a public comment letter from Craig Patterson and invited other board members to provide feedback to the co-chairs.

Executive Director Loftsgaarden invited board members and public to attend a day at the Oregon State Capitol on February 22 to celebrate 20 years of conservation.

The meeting was adjourned at 11:52 a.m. by Co-Chair Neuhauser. (Audio = 3:32:00)

## January 15-16, 2019 OWEB Board Meeting Focused Investment Subcommittee Update

### Subcommittee Members

Chair Jason Robison, Alan Henning, Gary Marshall, Will Neuhauser, Ron Alvarado, Paul Henson, Bruce Buckmaster

### Background

The Focused Investment Subcommittee focuses on issues related to the Focused Investment Program (FIP), including Development and Implementation FIPs, and the effectiveness of these programs.

### Summary of Focused Investment Subcommittee Work this Quarter

The subcommittee met on November 2 to prepare for interviewing FIP Implementation applicants at a two-day public session November 7-8. The subcommittee reviewed the agenda, timing, and procedures for the November 7-8 interviews, and reviewed draft interview questions for each of the 10 partnership applicants. In order to provide time for applicants to fully respond to evaluation concerns, the subcommittee directed staff to allot five minutes at the end of each 30 minute interview for this purpose.

At the November 7-8 public meeting, the subcommittee conducted interviews with each of the 10 partnership applicants on November 7. The interviews were well attended with partners traveling from around the state to participate, and the discussions were strong with meaningful information exchanged. On November 8, the subcommittee discussed the interviews, collected additional information from staff, and deliberated on ranking and funding recommendations for the 10 applicants. The final ranking and funding recommendations can be found as Attachment C to agenda Item O for the January board meeting.

The subcommittee also met on December 14 to prepare for several upcoming FIP events. First, the subcommittee discussed the format and content for a January 3 FIP webinar with the full board. Second, staff provided an update and timeline for the reassessment of board-identified FIP priorities through 2019. Staff have been working with state agencies (ODFW, ODF) to update the content and maps for several of the existing FIP priorities. Staff will compile an inventory of updates to share publicly for input, including outreach to tribes. Staff are targeting October 2019 to share the updated priorities with the full board for consideration of approval. Lastly, the subcommittee and staff discussed preparations for several FIP agenda items at the January board meeting, including:

- Current Implementation FIP reporting and possible discussion topics with each partnership (Item K);
- New Implementation FIP selections and the format for board deliberation of the subcommittee's recommendations (Item O);
- Two action items related to a) carrying forward 2015-17 funds for all partnerships, and b) considering a scope of initiative change for the Deschutes Partnership (Item N); and
- An overview of the Development FIP proposals that were reviewed in November and will be presented to the board for consideration of funding recommendations (Item J).

### To Be Presented at the January 2019 Board Meeting by:

Jason Robison, Subcommittee Chair

### Staff Contact

Eric Williams, Grant Program Manager  
[eric.williams@oregon.gov](mailto:eric.williams@oregon.gov) or 503-986-0047

## January 15-16, 2019 OWEB Board Meeting Monitoring Subcommittee Update

### Subcommittee Members

Chair Alan Henning, Stephen Brandt, Rosemary Furfey, Debbie Hollen, Molly Kile, Jason Robison

### Background

The Monitoring Subcommittee oversees work associated with both open solicitation programmatic effectiveness monitoring (EM) and Focused Investment Partnership (FIP) monitoring, and provides input about the monitoring of OWEB's capacity investments.

### Summary of Monitoring Subcommittee Work this Quarter

The subcommittee met on November 13, 2018, and discussed the following topics:

- Strategic Plan progress check-in, with a focus on Priority #6 (coordinated monitoring and shared learning) that included brainstorming about the strategy to "increase communication between and among scientists and practitioners" and suggestions from subcommittee members;
- Status updates about 'telling the restoration story' and FIP monitoring;
- Discussion about staff work on priority next steps from the tide gate literature review that were outlined for the board during the October 2018 meeting;
- Monitoring funding requests to be presented at the January 2019 board meeting, including 1) Conservation Reserve Enhancement Program (CREP) performance tracking, 2) Middle Fork John Day Intensively Monitored Watershed, 3) additional resources to support 'telling the restoration story,' and 4) support for newly selected Implementation FIPs to work with Bonneville Environmental Foundation to complete the results chain process; and
- Emerging monitoring topics for 2019, including 1) future OS programmatic EM funding requests, 2) coordination between restoration practitioners and monitoring experts regarding Stage 0 restoration techniques, and 3) initiation of an update of the administrative rules for monitoring grants.

The group is tentatively scheduled to meet again on December 18, 2018 for a brief check-in about final monitoring funding requests at the board meeting.

In the coming months, additional opportunities to 'tell the restoration story' likely will emerge. These opportunities may include either 1) a prospective approach in which monitoring is planned and data are collected before implementation of restoration begins, and continues to track the ecological effects of restoration through time; and/or 2) a hybrid approach that leverages existing data, but provides the opportunity to collect supplemental data to better answer the question of restoration effectiveness. Staff, in coordination with the board's Monitoring Subcommittee, will continue to track such opportunities and raise them before the full board as appropriate.

### To Be Presented at the January 2019 Board Meeting by:

Alan Henning, Subcommittee Chair

### Staff Contact

Renee Davis, Deputy Director, [renee.davis@oregon.gov](mailto:renee.davis@oregon.gov) or 503-986-0203

## January 15-16, 2019 OWEB Board Meeting Open Solicitation Subcommittee Update

### **Subcommittee Members**

Chair Meg Reeves, Kathy Stangl, Rosemary Furfey, Stephen Brandt

### **Background**

The Open Solicitation Subcommittee focuses on issues related to open solicitation grants, including restoration, technical assistance, and stakeholder engagement, and the effectiveness of these programs.

### **Summary of Focused Investment Subcommittee Work this Quarter**

The subcommittee met on December 12 and discussed the following topics:

#### **Strategic Plan**

This topic will be a recurring item on subcommittee agendas. The Open Solicitation Subcommittee will track actions under Strategic Plan Priority #5 - Working Lands, and Strategic Plan Priority #7 - Bold and Innovative Actions.

The subcommittee discussed progress made with the Oregon Agricultural Heritage Commission in developing program rules, which are on the January board agenda for adoption.

#### **Staff Presentations to the Board on Open Solicitation Projects**

Given the increasing complexity of applications, staff are continually improving review processes to help review teams evaluate applications. Staff sought input from the subcommittee on how best to portray to the board the review process and resulting staff recommendations.

The subcommittee noted that it is helpful for staff to provide the context for how projects relate to others that have been funded in the past. For example, in the last presentation, one Program Representative gave a good sense of how many years of project development, technical complexity, and challenges the project overcame. Telling the story of a project is particularly important.

Given the large number of projects, the thematic method of presenting a subset of recommended projects is a good approach. This approach also helps new board members understand how the process is conducted. Photos are helpful to understand the highlighted projects. In addition, it may be helpful to focus on projects near the funding line. The regional context will be helpful here as well.

Maintaining the focus on evaluation criteria while keeping content fresh is helpful. The subcommittee recommended being open about the struggles inherent in projects.

#### **Application Evaluations**

The subcommittee felt that evaluation documents are effective as they are currently presented. For above- and below-the-line projects, consider including information that helps distinguish why they ranked the way they did. In addition, staff should consider highlighting where there is not consensus in the review team.

#### **Other topics**

For the next meeting, staff will describe how strategic plan objectives are being pursued through the open solicitation grant program.

#### **To Be Presented at the January 2019 Board Meeting by:**

Meg Reeves, Subcommittee Chair

#### **Staff Contact**

Eric Williams, Grant Program Manager  
[eric.williams@oregon.gov](mailto:eric.williams@oregon.gov) or 503-986-0047

## January 15-16, 2019 OWEB Board Meeting Operating Capacity Subcommittee Update

### **Subcommittee Members**

Chair Debbie Hollen, Jan Lee, Barbara Boyer, Molly Kile, Liza Jane McAlister

### **Background**

The Operating Capacity Subcommittee focuses on issues related to watershed council and soil and water conservation district operating capacity grants, monitoring of capacity investments, support for the statewide partnership organizations, and organizational collaboration grants.

### **Summary of Operating Capacity Subcommittee Work this Quarter**

The subcommittee met in on November 1, 2018. The subcommittee discussed the following topics:

- Strategic Plan progress check-in covering Priorities 2, 3, and 7. Information on activities for all three of these priorities can be found in the Agenda Item D, Strategic Plan Update;
- Update on the 2019-2021 Council Capacity grant cycle and the role of the subcommittee. The online grant application was announced on December 3, 2018 and the applications are due March 4, 2019. The board will award grants at the July 2019 board meeting;
- Merger Implementation Grants and the amount and type of funding we should provide to merge watershed councils in the future. Staff provided background on this program and the subcommittee discussed questions and next steps. Staff will provide information on how we define a successful merger at the next subcommittee meeting; and
- Status update on Capacity monitoring.

The subcommittee will meet again on April 4, 2019.

### **To Be Presented at the January 2019 Board Meeting by:**

Debbie Hollen, Subcommittee Chair

### **Staff Contact**

Courtney Shaff, Capacity Programs Coordinator  
[courtney.shaff@oregon.gov](mailto:courtney.shaff@oregon.gov) or 503-986-0046



# Oregon

Kate Brown, Governor

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## MEMORANDUM

**TO:** Oregon Watershed Enhancement Board  
**FROM:** Meta Loftsgaarden, Executive Director  
**SUBJECT:** Agenda Item D – Strategic Plan Update  
January 15-16, 2019 Board Meeting

### I. Introduction

At this and upcoming meetings, staff will provide both general updates on plan progress, and more detailed updates as needed on specific priority areas.

### II. Background

In June, 2018, the board approved a new strategic plan. For the October 2018 board meeting, staff developed a template to track quarterly progress on strategic plan priorities. This template was presented and feedback about structure and content was provided by the board.

Following the October board meeting, staff added a header to all staff reports outlining the connection between the work contained in the staff report and the board's approved strategic plan.

Below are two updates for the board related to the strategic plan which are not contained in other staff reports.

### III. Strategic Plan Progress Tracking

The template to track strategic plan progress was updated based on input from the board at the October 2018 meeting. Attachment A reflects these updates, and outlines progress made during the October-December 2018 period.

### IV. Priority 3, Strategy 1 – Evaluation of Capacity Investments

Strategy 1 under Priority 3 of the strategic plan aims to “evaluate and identify lessons learned from OWEB’s past capacity funding.” In response, staff initiated development of a framework for the retrospective evaluation of OWEB’s organizational capacity investments.

By way of background, OWEB, in coordination with the Oregon Department of Agriculture (ODA), has been providing watershed councils and soil and water conservation districts (SWCDs) with operating capacity funding for more than 20 years. By evaluating one of OWEB’s longest running programs and developing lessons learned, the agency affirms its commitment to meaningful monitoring and evaluation of all of OWEB’s investment programs. At the conclusion of this process, OWEB and ODA expect to be able to clearly tell the story of the value of capacity investments. The agencies also will have important lessons learned to inform future program refinements, in addition

to new and innovative tools for tracking and reporting the outcomes and impacts of capacity investments through time.

OWEB is working with the agency's strategic plan consultant, Dialogues in Action, to develop the evaluation framework for capacity investments. Staff also are integrating expertise from Jennifer Arnold of Reciprocity Consulting, who led the Focused Investment Partnership (FIP) Partnership Learning Project. High-level steps in the process to develop an evaluation framework include:

- Orientation and framing, including articulating intention, impacts, indicators and principles of change, and drafting of research questions;
- Preliminary planning and design of the retrospective evaluation; and
- Preparation of material that OWEB will use as the foundation for a procurement process to contract for the evaluation.

To inform development of the evaluation framework, OWEB is convening two advisory groups: 1) a stakeholder advisory group (consisting of three watershed councils and three SWCDs) and 2) an expert advisory group consisting of individuals who are well versed in social science and evaluation. OWEB also is working with ODA to reach out to interested partners such as the Network of Oregon Watershed Councils, the Oregon Association of Conservation Districts, and the Soil and Water Conservation Commission.

The evaluation framework will be completed by the end of June 2019. Staff will provide periodic updates to the board about progress.

## **V. Recommendation**

This is an information item only.

## **VI. Attachments**

A. OWEB Strategic Plan Progress Report October to December 2018



## OWEB Strategic Plan Progress QUARTERLY PROGRESS UPDATE – October-December 2018

Priority 1 - Broad awareness of the relationship between people and watersheds					
<b>Strategies</b>	1. Develop and implement broad awareness campaigns and highlight personal stories to tell the economic, restoration, and community successes of watershed investments	<u>In The Last Quarter, We Did This: (actions)</u> <ul style="list-style-type: none"> <li>- Coordinated with Oregon Lottery on a state-wide watershed awareness campaign featuring people, places, and projects that demonstrate Oregon’s Conservation ethic, featured projects: Ashland Forest Resiliency, 6 Ranch Habitat Restoration, Meacham Creek, Fivemile-Bell Restoration Project, Cavender Wetland Enhancement and Willamette Confluence Preserve.</li> <li>- Oct-Nov 2018 campaign included a widely distributed TV commercial, 5 billboards in Portland, Bend and Salem (I-5 and I-84); videos are available at: <a href="https://www.oregonlottery.org/watersheds">https://www.oregonlottery.org/watersheds</a></li> <li>- Presented to Oregon Lottery on OWEB mission and provided data to support future campaigns.</li> <li>- Provided Oregon Lottery campaign materials to partners and grantees to promote watershed awareness in their communities.</li> </ul>	<u>So That: (outputs)</u> <ul style="list-style-type: none"> <li>- Local partners are trained and have access to media and tools.</li> <li>- Local conservation organizations have meaningful connection to local media.</li> <li>- Each region has access to public engagement strategies that reach non-traditional audiences.</li> <li>- Oregon Lottery media campaigns have new stories every year of watershed work and progress.</li> </ul>	<u>To Make This Difference: (outcomes)</u> <ul style="list-style-type: none"> <li>- Non-traditional partners are involved and engaged in strategic watershed approaches.</li> <li>- Successes are celebrated at the local and state level through use of appropriate tools.</li> <li>- More Oregonians:                             <ul style="list-style-type: none"> <li>o are aware of the impacts of their investment in their watershed;</li> <li>o understand why healthy watersheds matter to their family and community;</li> <li>o understand their role in keeping their watershed healthy.</li> </ul> </li> </ul>	<u>Near-term measure:</u> <ul style="list-style-type: none"> <li>- Fall 2018 Oregon Lottery campaign featured 6 partners from 5 OWEB regions with 1,243 YouTube views (accessed 12/5/2018).</li> </ul> <u>Potential impact measure:</u> <ul style="list-style-type: none"> <li>- Increase in public conversation about watersheds and people’s role in keeping them healthy.</li> <li>- Increase recognition of landowner connection to healthy watersheds.</li> <li>- Broader representation/greater variation of populations represented in the Oregon watershed stories.</li> </ul>
	2. Increase involvement of non-traditional partners in strategic watershed approaches				
Priority 2 - Leaders at all levels of watershed work reflect the diversity of Oregonians					
<b>Strategies</b>	1. Listen, learn and gather Information about diverse populations	<u>In The Last Quarter, We Did This: (actions)</u> <ul style="list-style-type: none"> <li>- Diversity, Equity and Inclusion (DEI) cross-sectional team met monthly; currently developing work plan.</li> <li>- Trainings in which various staff participated:                             <ul style="list-style-type: none"> <li>▪ Engaging Tribes in Meeting Common Goals lunch &amp; learn</li> <li>▪ Tribal Heritage History with Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians workshop</li> <li>▪ Grantmaking with an Equity Lens Training workshop</li> <li>▪ Digging Into Demographic Data webinar</li> <li>▪ Hispanic Heritage Month (Oct.) lunch &amp; learn</li> </ul> </li> <li>- Encouraged staff to complete Project Implicit exercises to learn more about our own implicit biases: <a href="https://implicit.harvard.edu/implicit/">https://implicit.harvard.edu/implicit/</a></li> <li>- IDEA team presented an activity at November 2018 OWEB All-Staff meeting to explore link between DEI concepts and OWEB’s programs.</li> <li>- Tribal liaison and staff completed Annual Tribal Report describing how OWEB engaged with Tribes in Oregon in 2018; report delivered to Legislative Commission on Indian Services and the Governor’s Office.</li> <li>- Deputy Director and tribal liaison attended Annual Tribal Summit and training hosted by the Confederated Tribes of Grand Ronde.</li> </ul>	<u>So That: (outputs)</u> <ul style="list-style-type: none"> <li>- OWEB board and staff have been trained in diversity, equity and inclusion (DEI).</li> <li>- OWEB has DEI capacity.</li> <li>- OWEB grantees and partners have access to DEI tools and resources.</li> <li>- DEI are incorporated into OWEB grant programs, as appropriate.</li> <li>- OWEB staff and board develop awareness of how social, economic, and cultural differences impact individuals, organizations and business practices.</li> <li>- OWEB staff and board share a common understanding of OWEB’s unique relationship with tribes.</li> <li>- Board and staff regularly engage with underrepresented partnerships and stakeholder groups to support DEI work.</li> </ul>	<u>To Make This Difference: (outcomes)</u> <ul style="list-style-type: none"> <li>- New and varied populations are engaged in watershed restoration</li> <li>- Grantees and partners actively use DEI tools and resources to recruit a greater diversity of staff, board members and volunteers.</li> <li>- Increased engagement of under-represented communities in OWEB grant programs and programs of our stakeholders.</li> <li>- OWEB, state agencies, and other funders consider opportunities to fund natural resource projects with a DEI lens.</li> </ul>	<u>Near-term measure:</u> <ul style="list-style-type: none"> <li>- Staff has participated in 186 hours of cumulative training since July 2018.</li> </ul> <u>Potential impact measure:</u> <ul style="list-style-type: none"> <li>- Increased awareness by grantees of gaps in community representation.</li> <li>- Increased representation of Grantees and partners from diverse communities on boards, staff, and as volunteers.</li> <li>- Increased funding provided to culturally diverse stakeholders and populations.</li> </ul>
	2. Create new opportunities to expand the conservation table				
	3. Develop funding strategies with a lens toward diversity, equity, and inclusion (DEI)				



**Priority 3 - Community capacity and strategic partnerships achieve healthy watersheds**

<b>Strategies</b>	1. Evaluate and identify lessons learned from OWEB's past capacity funding	<p><u>In The Last Quarter, We Did This: (actions)</u></p> <ul style="list-style-type: none"> <li>- Continue to scope and develop an evaluation of past council and SWCD capacity investments with Oregon Department of Agriculture and consultants.</li> <li>- Convened external stakeholder advisory group to gather expert input on capacity evaluation.</li> </ul>	<p><u>So That: (outputs)</u></p> <ul style="list-style-type: none"> <li>- Data exists to better understand the impacts of OWEB's capacity investments</li> <li>- Help exists for local groups to define their restoration 'community' for purposes of partnership/community capacity investments.</li> <li>- A suite of alternative options exists to invest in capacity to support conservation outcomes.</li> <li>- New mechanisms are available for watershed councils and soil and water conservation districts to report on outcomes of capacity funding.</li> <li>- A set of streamlined cross-agency processes exist to more effectively implement restoration projects.</li> <li>- Local capacity strengths and gaps are identified to address and implement large-scale conservation solutions.</li> </ul>	<p><u>To Make This Difference: (outcomes)</u></p> <ul style="list-style-type: none"> <li>- Partners access best community capacity and strategic practices and approaches.</li> <li>- OWEB can clearly tell the story of the value of capacity funds.</li> <li>- Funders are aware of the importance of funding capacity.</li> <li>- Lessons learned from past capacity investments inform funding decisions.</li> <li>- Restoration projects involving multiple agencies are implemented more efficiently and effectively</li> <li>- State-federal agencies increase participation in strategic partnerships.</li> </ul>	<p><u>Near-term measure:</u></p> <ul style="list-style-type: none"> <li>- Actions taken to advance strategy</li> </ul> <p><u>Potential impact measure:</u></p> <ul style="list-style-type: none"> <li>- Increase in indicators of capacity for entities.</li> <li>- Increased restoration project effectiveness from cross-agency efforts.</li> <li>- Increase in funding for capacity by funders other than OWEB.</li> </ul>
	2. Champion best approaches to build organizational, community, and partnership capacity	<ul style="list-style-type: none"> <li>- Discussed lessons learned from the FIP Partnership Learning Project with the Development FIP expert review team.</li> <li>- Reviewed 4 Development FIP Applications.</li> </ul>			
	3. Accelerate state/federal agency participation in partnerships	<ul style="list-style-type: none"> <li>- Helped coordinate application submission of 5 NWQI Drinking Water Protection pilot projects to the USDA in partnership with NRCS; all projects received funding.</li> <li>- Presentation of OWEB Strategic Plan to Region 5 Review Team (5/6 RRTs now complete), STREAM TEAM and Grand Ronde Model Watershed Annual Board Meeting, including dialogue around Priority 3 and OWEB's interest in supporting interagency collaboration where appropriate.</li> </ul>			

**Priority 4 - Watershed organizations have access to a diverse and stable funding portfolio**

<b>Strategies</b>	1. Increase coordination of public restoration investments and develop funding vision	<p><u>In The Last Quarter, We Did This: (actions)</u></p> <ul style="list-style-type: none"> <li>- Continued relationship with ODOT to administer grant funds to watershed councils to improve fish habitat in streams impacted by state transportation infrastructure, including developing an Interagency Master Funding Contribution Agreement.</li> </ul>	<p><u>So That: (outputs)</u></p> <ul style="list-style-type: none"> <li>- OWEB has a clear understanding of its role in coordinating funding.</li> <li>- OWEB and other state and federal agencies have developed a system for formal communication and coordination around grants and other investments.</li> <li>- OWEB and partners have a coordinated outreach strategy for increasing watershed investments by state agencies, foundations, and corporations.</li> <li>- Foundations and corporations are informed about the important restoration work occurring in Oregon and understand the additional community benefits of restoration projects.</li> <li>- Foundations and corporations know OWEB, how the agency's investments work, and how they can partner.</li> <li>- Foundations and corporations understand the importance of</li> </ul>	<p><u>To Make This Difference: (outcomes)</u></p> <ul style="list-style-type: none"> <li>- Agencies have a shared vision about how to invest strategically in restoration.</li> <li>- Oregon has a comprehensive analysis of the state's natural and built infrastructure to direct future investments.</li> <li>- Foundations and corporations are partners in watershed funding efforts.</li> <li>- Foundations and corporations increase their investment in restoration.</li> <li>- Natural resources companies are implementing watershed health work that is also environmentally sustainable.</li> </ul>	<p><u>Near-term measure:</u></p> <ul style="list-style-type: none"> <li>- Increase in the use of new and diverse funding sources by grantees.</li> </ul> <p><u>Potential impact measure:</u></p> <ul style="list-style-type: none"> <li>- Increase in grantees cash match amount and diversity of cash match in projects.</li> <li>- Increase in new and diverse funding sources.</li> <li>- Increase in creative funding mechanisms and strategies.</li> <li>- Increased high-quality conservation and restoration projects are funded without OWEB investment.</li> <li>- Increased funding for bold and innovative, non-traditional investments.</li> </ul>
	2. Align common investment areas with private foundations				
	3. Explore creative funding opportunities and partnerships with the private sector				
	4. Partner to design strategies for complex conservation issues that can only be solved by seeking new and creative funding sources	<ul style="list-style-type: none"> <li>- Assisted with drafting of an incentives document focusing on agricultural landowners to inform the Natural and Working Lands Work Group convened by the Governor's Carbon Policy Office.</li> <li>- Participated in Oregon Leadership Summit sessions highlighting Oregon's 100-year Water Infrastructure Vision.</li> <li>- Assisted with Water Core Team drafting of informational two-pagers regarding natural and built water infrastructure knowns and unknowns.</li> </ul>			

			<ul style="list-style-type: none"> <li>investing in healthy watersheds</li> <li>- Foundations and corporations consider restoration investments in their investment portfolios.</li> <li>- Oregon companies that depend on healthy watersheds are aware of the opportunity to invest in watershed health.</li> </ul>		
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**Priority 5 - The value of working lands is fully integrated into watershed health**

<b>Strategies</b>	1. Implement the Oregon Agricultural Heritage Program	<u>In The Last Quarter, We Did This: (actions)</u> - Solicited public comment on revisions to proposed rules for Oregon Agricultural Heritage Program.	<u>So That: (outputs)</u> - Landowner engagement strategies and tools are developed and used by local conservation organizations	<u>To Make This Difference: (outcomes)</u> - Generations of landowners continue to integrate conservation on their working lands while maintaining economic sustainability.	<u>Near-term measure:</u> - Percentage of landowners identified within Strategic Implementation Areas that receive technical assistance.
	2. Strengthen engagement with a broad base of working landowners		- Strategies and stories are being utilized to reach owners and managers of working lands who are not currently working with local organizations.	- Fully functioning working landscapes remain resilient into the future.	<u>Potential impact measure:</u> - Increased conservation awareness amongst owners and managers of working lands.
	3. Enhance the work of partners to increase working lands projects on farm, ranch and forestlands		- Local organizations have the technical assistance to address gaps in implementing working land conservation projects.	- Across the state, local partners have the resources necessary to better facilitate why and where restoration opportunities exist on working lands.	- A better understanding of conservation participation, barriers and incentives for working lands owners.
	4. Support technical assistance to work with owners/managers of working lands	- Continued Strategic Implementation Area technical assistance grant program to engage private landowners in streamside management for water quality; an additional 7 soil and water conservation districts were selected for a total of 12 SIAs in the biennium.	- Examples of successful working lands conservation projects are available for local organizations to use.	- Sustained vitality of Oregon’s natural resources industries.	- Expanded relationships with agriculture and forestry associations.
	5. Develop engagement strategies for owners and managers of working lands who may not currently work with local organizations		- New partners are engaged with owners and operators of working lands to increase conservation. - The Oregon Agricultural Heritage Commission has administrative rules and stable funding for the OAHP to protect working lands. - Local capacity exists to implement the Oregon Agricultural Heritage Program.		- Increased engagement of owners and managers of working lands conservation projects. - Increased working lands conservation projects on farm, ranch, and forest lands. - Expanded working lands partnerships improve habitat and water quality. - Expanded funding opportunities exist for working lands conservation.

**Priority 6 - Coordinated monitoring and shared learning to advance watershed restoration effectiveness**

	1. Broadly communicate restoration outcomes and impacts	<u>In The Last Quarter, We Did This: (actions)</u> - Completed pre-application consultations with six “Telling the Restoration Story” grant applicants; agreements in place with Smith River Watershed Council (WC), Rogue Basin Partnership, Long Tom WC, Coos Watershed Association, McKenzie Watershed Alliance and Lake County Umbrella WC; planning for future recruitment. - Continued work with Conservation Effectiveness Partnership to describe effectiveness of cumulative conservation and restoration actions with agency partners; completed Wilson River GIS Story Map and reviewed early data analysis for Fifteenmile Creek Watershed Case Study update.	<u>So That: (outputs)</u> - Additional technical resources—such as guidance and tools—are developed and/or made accessible to monitoring practitioners. - Priorities are proactively established and clearly articulated to plan for adequate monitoring resources that describe restoration investment outcomes.	<u>To Make This Difference: (outcomes)</u> - Decision-making at all levels is driven by insights derived from data and results. - Limited monitoring resources are focused on appropriate, high-quality, prioritized monitoring being conducted by state agencies, local groups, and federal agencies conducting monitoring.	<u>Near-term measure:</u> - Number of communication tools developed through staff, grants or partnerships.  <u>Potential impact measure:</u> - Increased public awareness about the outcomes and effects of watershed restoration and why it matters to Oregonians
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<b>Strategies</b>	2. Invest in monitoring over the long term	<ul style="list-style-type: none"> <li>- Continued development of progress tracking framework to report out on outputs and outcomes of Implementation FIPs; piloted draft and gained feedback from Ashland Forest Resiliency Initiative.</li> <li>- Recruited east and west-side CREP technician leads to develop a monitoring approach for performance tracking to pilot in 2019.</li> </ul>	<ul style="list-style-type: none"> <li>- Monitoring practitioners focus efforts on priority monitoring needs.</li> <li>- A network of experts is available to help grantees develop and implement successful monitoring projects.</li> <li>- Information is readily available to wide audiences to incorporate into adaptive management and strategic planning at the local level.</li> <li>- A dedicated process exists for continually improving how restoration outcomes are defined and described.</li> <li>- Strategic monitoring projects receive long-term funding.</li> </ul>	<ul style="list-style-type: none"> <li>- Local organizations integrate monitoring goals into strategic planning.</li> <li>- Evaluation of impact, not just effort, is practiced broadly.</li> <li>- Impacts on ecological, economic and social factors are considered as a part of successful monitoring efforts.</li> <li>- Partners are using results-based restoration 'stories' to share conservation successes and lessons learned.</li> <li>- Monitoring frameworks are developed and shared.</li> <li>- Monitoring results that can be visualized across time and space are available at local, watershed and regional scales.</li> <li>- Limited monitoring resources provide return on investment for priority needs.</li> </ul>	<ul style="list-style-type: none"> <li>- Increased utilization of effective and strategic monitoring practices by grantees and partners</li> <li>- Improved restoration and monitoring actions on the ground to meet local and state needs.</li> <li>- Increase in local organizations that integrate monitoring goals into strategic planning.</li> <li>- Increased engagement and support of restoration and conservation activities.</li> <li>- Increased decision-making at all levels is driven by insights derived from data and results.</li> <li>- Increased ability to evaluate social change that leads to ecological outcomes.</li> </ul>
	3. Develop guidance and technical support for monitoring	<ul style="list-style-type: none"> <li>- STREAM TEAM completed Statewide Monitoring Strategy to identify and clarify water-related monitoring jurisdictions, roles and responsibilities related to OR agencies.</li> <li>- Led STREAM TEAM review process for an inter-agency water-related Monitoring Calendar and Monitoring Map Viewer. The map shows locations where Oregon's state agencies are actively engaged in monitoring activities for the current calendar year.</li> </ul>			
	4. Increase communication between and among scientists and practitioners	<ul style="list-style-type: none"> <li>- Working with Middle Fork John Day Intensively Monitored Watersheds to share results and foster information exchange on river restoration research.</li> <li>- University of Oregon communicated out their OWEB -funded economic analysis of the Middle Fork John Day IMW that analyzed how river restoration contributes to rural economies.</li> </ul>			
	5. Define monitoring priorities	<ul style="list-style-type: none"> <li>- Convened Oregon Plan Monitoring Team to review Open Solicitation Fall 2018 monitoring applications.</li> </ul>			
	6. Develop and promote a monitoring framework				

**Priority 7 - Bold and innovative actions to achieve health in Oregon's watersheds**

<b>Strategies</b>	1. Invest in landscape restoration over the long term	<p><u>In The Last Quarter, We Did This: (actions)</u></p> <ul style="list-style-type: none"> <li>- Held Focused Investment Partnership board sub-committee meeting to review Implementation FIP applicants and develop a funding recommendation to the full OWEB board.</li> <li>- Presentation of OWEB Strategic Plan to Region 5 Review Team (5/6 RRTs now complete), including dialogue around Priority 7 and OWEB's interest in supporting experimentation where appropriate.</li> </ul>	<p><u>So That: (outputs)</u></p> <ul style="list-style-type: none"> <li>- OWEB works with partners to share results of landscape scale restoration with broader conservation community.</li> <li>- OWEB and partners have a better understanding of how restoration approaches can be mutually beneficial for working lands and watershed health.</li> <li>- OWEB's landscape-scale granting involves effective partnerships around the state.</li> </ul>	<p><u>To Make This Difference: (outcomes)</u></p> <ul style="list-style-type: none"> <li>- Multi-phased, high-complexity, and large geographic footprint restoration projects are underway.</li> <li>- OWEB's investment approaches recognize the dual conservation and economic drivers and benefits of watershed actions, where appropriate.</li> <li>- Diverse, non-traditional projects and activities that contribute to watershed health are now funded that weren't previously.</li> <li>- Conservation communities value an experimental approach to learning and innovation.</li> <li>- Conservation communities become comfortable with properties and projects that show potential, even if the work is not demonstrated based on demonstrated past performance.</li> <li>- OWEB becomes better able to evaluate risk</li> <li>- OWEB encourages a culture of innovation.</li> </ul>	<p><u>Near-term measure:</u></p> <ul style="list-style-type: none"> <li>- 16.29% of Oregon is covered by a Strategic Action Plan associated with a FIP or Coho Business Plan.</li> </ul> <p><u>Potential impact measure:</u></p> <ul style="list-style-type: none"> <li>- Increased strategic watershed restoration footprint statewide.</li> <li>- Increased money for innovative watershed work from diverse funding sources.</li> <li>- Increased learning from bold and innovative actions so future decisions result in healthy watersheds in Oregon</li> <li>- New players or sectors—such as healthcare providers—engaged to invest in watershed restoration, enhancement and protection.</li> </ul>
	2. Develop investment approaches in conservation that support healthy communities and strong economies	<ul style="list-style-type: none"> <li>- Bobby Cochran presented the 100-year Water Infrastructure Vision for Oregon at the Oregon Leadership Summit. Dr. Cochran is Senior Fellow at National Policy Consensus Center and ED of the Willamette Partnership; OWEB supports this work through a strategic planning grant.</li> </ul>			
	3. Foster experimentation that aligns with OWEB's mission	<ul style="list-style-type: none"> <li>- Presentation of OWEB Strategic Plan to Region 5 Review Team (5/6 RRTs now complete), including dialogue around Priority 7 and OWEB's interest in supporting experimentation where appropriate.</li> <li>- Developed Strategic Plan priority fact sheets to increase stakeholder awareness of OWEB's future direction and priorities.</li> </ul>			



## January 15-16, 2019 OWEB Board Meeting Executive Director Update E-1: Focused Investment Partnership (FIP) Monitoring

This report provides the board an update about two areas of work associated with FIP monitoring: supplemental monitoring and reporting funding, and the FIP Progress tracking report.

### Background

OWEB has engaged with Bonneville Environmental Foundation (BEF) to develop a progress monitoring framework for each of the current six Implementation FIPs. The framework helps the FIPs communicate progress toward desired ecological outcomes, and includes a detailed results chain. In April 2018, the board awarded supplemental funding for the six FIPs to fill monitoring gaps and/or reporting needs identified from the results chain work.

Also in April 2018, staff described upcoming collaborative work among OWEB, BEF and the implementation FIPs to develop a reporting template to visualize progress to the board and other funders through time.

### FIP Supplemental Funding for Monitoring and Reporting

Working within the context of the progress monitoring framework, each of the six FIPs has identified or is in the process of identifying the top 1-2 priorities for supplemental funding, ranging between \$75,000 and \$125,000, to help each FIP describe and communicate holistically about progress being achieved by their work. The first application for this funding has been received and awarded, with others in development. Each application receives a technical review. Gaps to be addressed by the FIPs are outlined below:

- **Oregon Model to Protect Sage-Grouse, All Counties:** Candidate Conservation Agreements with Assurances database to assist with planning, monitoring, reporting and implementation.
- **Upper Grande Ronde Initiative:** Effectiveness monitoring of fish populations in reaches where FIP restoration actions have occurred.
- **Ashland Forest All-Lands Restoration Initiative:** Social and ecosystem services monitoring.
- **Deschutes Partnership:** Watershed-scale monitoring application in support of the results chain that was created for the partnership's work in McKay Creek.
- **Upper and Middle Willamette Mainstem Anchor Habitats:** Monitoring of fish populations, physical habitat, and aquatic invasive species.
- **Harney Basin Wetlands Initiative:** Prioritization underway.

### FIP Progress Tracking Report

Staff are working with BEF to develop a report template to track incremental progress of the Implementation FIPs toward meeting their initiative's ecological objectives. These reports will align strategies presented in each partnership's results chains with work completed to implement strategic action plans. The reports are expected to be brief documents that feature easy-to-understand graphics interpreting the approach guiding the partnership's effort to achieve their goals using data for restoration outputs and outcomes.

The Ashland Forest All-Lands Restoration Initiative is piloting the template structure and report content. Staff have met with the partners and will finalize the progress tracking report this winter. OWEB and BEF staff will then work individually with the other partnerships to customize reports for each FIP, with a goal of completing all six Implementation FIPs next summer.

### Staff Contact

If you have questions or need additional information, contact Renee Davis, Deputy Director, at [renee.davis@oregon.gov](mailto:renee.davis@oregon.gov) or 503-986-0203.

## January 15-16, 2019 OWEB Board Meeting Executive Director Update E-2: Salmon License Plates

This item describes the plan to update Oregon's Salmon License Plate in partnership with the Oregon Parks and Recreation Department.

### **Background**

Oregon's current salmon license plates were approved in 1999. Salmon license plate revenues are distributed equally between the Oregon Parks and Recreation Department (OPRD) and OWEB. Over the last few biennia, salmon plate revenues to OWEB have averaged \$483,000, which is invested directly in OWEB grants that support salmon habitat, or removing barriers to salmon migration.

### **Developing a New Salmon License Plate**

To coincide with the 20<sup>th</sup> anniversary of the Salmon License Plate, OWEB and OPRD staff will be working with the Oregon Department of Transportation's Department of Motor Vehicles and the Oregon Lottery to develop and promote a new salmon license plate design.

### **Next steps**

Staff are working to finalize the design approach for the new license plates and will be proceeding into the design phase in the new year, with a plan to have a final design ready to unveil next summer.

### **Staff Contact**

If you have questions or need additional information, contact Jillian McCarthy ([jillian.mccarthy@oregon.gov](mailto:jillian.mccarthy@oregon.gov)) or 503-986-0033.

## January 15-16, 2019 OWEB Board Meeting Executive Director Update E-3: Budget and Legislative

This report provides the board an update about the Governor's Recommended Budget and preparations for the 2019 Legislative Session.

### **Background**

The Oregon Legislature approves budgets for state agencies on a biennial basis. Budgets are structured so that each agency's current (or "base") budget is recalibrated and submitted without need for specific policy description or justification. Any resources requested to be added to the base budget by agencies must be identified separately with policy narratives and justification. The requested additions to an agency's base budget are called "policy option packages," or POPs.

The board approved OWEB's POPs at the June 2018 meeting that addressed internal staffing and resource needs, while reflecting needs associated with broader initiatives coordinated with the Governor's Office and other agencies. These POPs were included in OWEB's Agency Request Budget (ARB) that was submitted in August 2018.

The Oregon Legislature will meet for the 2019 Legislative Session beginning January 22. On January 14-16, the Legislature will hold Organizational Days to organize and prepare for the session. In addition, the Legislative Leadership has established committees and assigned members. Attachment A includes a list of relevant natural resources committees including chairs and members.

### **The Governor's Recommended Budget**

The November 2018 economic forecast projects that the economy will continue to grow at a modest, but slower pace than in recent years. Lottery revenues to OWEB in 2019-21 are expected to be higher than budgeted in 2017-19, and the 2017-19 biennium will have an ending balance for use in 2019-21. While overall state revenues are anticipated to increase, the amount is not expected to keep up with increasing state payroll costs and other cost increases associated primarily with health care, education, and corrections. In addition, revenues are expected to continue to be impacted by the roll-back associated with the PERS reform implemented last biennium.

With this information as context, after agencies submitted their ARBs, the Governor's Office developed state budget recommendations in partnership with agencies. This budget proposal—known as the Governor's Recommended Budget, or GRB—also includes additional POPs that reflect the Governor's priorities and initiatives. The GRB is the starting point for agency budget discussions at legislative hearings. During the legislative session, agencies may advocate for their individual Policy Packages only to the extent that they are included in the GRB.

The Governor's budget was released on November 28, 2019. The GRB retains all of the following requests from OWEB's ARB:

- Program Continuity package (Conservation Outcomes Coordinator and Conservation Outcomes Specialist positions);
- Program Enhancement package (Partnerships Coordinator and Online Systems Project Manager positions and contracted services);
- Conservation Policy and Strategy Coordination package (contracted services); and
- Grant funds for: Measure 76 lottery funds; carryforward of federal grant funds and other funds; forest collaborative grant funds; federal funds from Natural Resources Conservation Service; loan funds from the Clean Water State Revolving Loan Fund; and funds for Upper Klamath Basin grants associated with salmon reintroduction.

Along with 12 other agencies, the Governor's Office added funding for an internal auditor position to OWEB's budget, as part of her 'Smart Government' emphasis area.

Policy packages requested by OWEB, but not included in the GRB, are both operations and grant funding related to the Oregon Agricultural Heritage Program (OAHP).

OWEB's current service level did not take any reductions. However, the agency still is required to submit a report that lists 10 percent reduction options from current service level by priority for all fund sources. Despite this, full reductions have not been taken in the past few budget cycles. Depending on future revenue outlooks and the level of remaining ending balances from the 2017-19 biennium, the upcoming legislative budget cycle may or may not require the implementation of some degree of reductions.

Staff are updating budget documents to reflect the Governor's Budget. During the legislative session, the first phase of the budgeting process—agency budget presentations during legislative hearings—occurs between February and early April. As needed, additional discussion of budgetary issues may occur beyond this time. Work sessions with the Natural Resources Subcommittee of the Ways and Means Committee may occur any time after agency budget hearings are completed. Staff will update the board as OWEB's budget progress through the legislative budgeting process.

### **Legislative**

OWEB has developed one legislative concept that if approved, will provide technical corrections to OAHP statutes. Proposed statutory changes include:

- 1) Shifting language in ORS 541.982 to remove requirement that continued agricultural use be an affirmative obligation of a conservation easement.
- 2) Providing a more accurate description of the individuals who would be eligible to participate in succession planning programs in ORS 541.984.
- 3) Changing wording regarding conservation management plans from 'purchasing' plans to 'developing' plans in ORS 541.981 and ORS 541.984.
- 4) Revising technical assistance grant use in 541.984 to more accurately reflect the purpose of the grant funds, and to expand the eligible applicants to all organizations that are eligible to enter into conservation easements or covenants.
- 5) Changing language to be consistent throughout the statute regarding the relationship between the commission and the board in ORS 541.988.
- 6) Revising language to match OWEB's process where technical committees can either advise staff who make recommendations to the board/commission or can advise the board/commission directly in ORS 541.988.

### **Staff Contact**

If you have questions or need additional information about budget topics, contact Renee Davis, Deputy Director, at [renee.davis@oregon.gov](mailto:renee.davis@oregon.gov) or 503-986-0203. If you have questions or need additional information about legislative topics, contact Eric Hartstein, Senior Policy Coordinator, at [eric.hartstein@oregon.gov](mailto:eric.hartstein@oregon.gov) or 503-986-0029.

### **Attachments**

- A. List of relevant natural resources committees including chairs and members.

## 2018-2019 Oregon Interim Legislature OWEB-Related Committee Assignments

**Table 1: Senate Environment and Natural Resources Committee**

Member	District	Area (Basin)
Sen. Michael Dembrow, Chair (D)	23	Portland (Willamette)
Sen. Alan Olsen, Vice-Chair (R)	20	Canby (Willamette)
Sen. Cliff Bentz (R)	30	Eastern/Central Oregon (Multiple)
Sen. Floyd Prozanski (D)	4	South Lane and North Douglas Counties (Willamette/Umpqua)
Sen. Arnie Roblan (D)	5	Coos Bay (Oregon Coast)

**Table 2: House Agriculture and Land Use Committee**

Member	District	Area (Basin)
Rep. Brian Clem, Chair (D)	21	Salem (Willamette)
Rep. Susan McLain, Vice Chair (D)	29	Hillsboro (Willamette)
Rep. Bill Post, Vice Chair (R)	25	Keizer (Willamette)
Rep. Shelly Boshart Davis (R)	15	Linn County (Willamette)
Rep. Ken Helm (D)	34	Washington County (Willamette)
Rep. David Brock Smith (R)	1	Gold Beach (South Coast)
Rep. Anna Williams (D)	52	Hood River (Columbia)

**Table 3: House Energy and Environment Committee**

Member	District	Area (Basin)
Rep. Ken Helm, Chair (D)	34	Washington County (Willamette)
Rep. Sheri Schouten, Vice Chair (D)	27	Beaverton (Willamette)
Rep. E. Werner Reschke, Vice Chair (R)	56	Klamath Falls (Klamath)
Rep. Lynn Findley (R)	60	Eastern Oregon (multiple)
Rep. Andrea Salinas (D)	38	Lake Oswego (Willamette)
Rep. Janeen Sollman (D)	30	Hillsboro (Willamette)
Rep. Marty Wilde (D)	11	Lane/Linn Counties (Willamette)
Rep. Anna Williams (D)	52	Hood River (Columbia)
Rep. Jack Zika (R)	53	Deschutes County (Deschutes)

**Table 4: Natural Resources Committee**

Member	District	Area (Basin)
Rep. Brad Witt, Chair (D)	31	Clatskanie (Lower Columbia)
Rep. Chris Gorsek, Vice Chair (D)	49	Gresham (Sandy)
Rep. Sherrie Sprenger, Vice Chair (R)	17	Scio (Willamette)
Rep. Greg Barreto (R)	58	Cove (Umatilla)
Rep. Caddy McKeown (D)	9	Coos Bay (South Coast)
Rep. Jeff Reardon (D)	48	E. Portland (Willamette)
Rep. David Brock Smith (R)	1	Gold Beach (South Coast)



**Table 5: Joint Ways and Means Natural Resources Subcommittee**

<b>Member</b>	<b>District</b>	<b>Area (Basin)</b>
Sen. Kathleen Taylor, Co-Chair (D)	21	Portland (Willamette)
Rep. Jeff Reardon, Co-Chair (D)	48	E. Portland (Willamette)
Sen. Fred Girod (R)	9	Stayton (Willamette)
Sen. Lew Frederick (D)	22	Portland (Willamette)
Rep. Cedric Hayden (R)	7	Roseburg(Umpqua)
Rep. Paul Hovey (D)	8	Eugene (Willamette)
Rep. Courtney Neron (D)	26	Wilsonville (Willamette)
Rep. David Brock Smith (R)	1	Gold Beach (South Coast)

**Table 6: Joint Committee on Carbon Reduction**

<b>Member</b>	<b>District</b>	<b>Area (Basin)</b>
Sen. Michael Dembrow, Co-Chair (D)	23	Portland (Willamette)
Rep. Karin Power, Co-Chair (D)	41	Milwaukie (Willamette)
Sen. Cliff Bentz, Co-Vice Chair (R)	30	Eastern/Central Oregon (Multiple)
Rep. David Brock Smith, Co-Vice Chair (R)	1	Gold Beach (South Coast)
Sen. Lee Beyer (D)	6	Springfield (Willamette)
Sen. Fred Girod (R)	9	Stayton (Willamette)
Sen. Kathleen Taylor (D)	21	Portland (Willamette)
Sen. Alan Olsen (R)	20	Canby (Willamette)
Sen. Jeff Golden (D)	3	Ashland (Rogue)
Rep. Daniel Bonham (R)	59	Central Oregon(Columbia/Deschutes)
Rep. Shelly Boshart Davis (R)	15	Linn County (Willamette)
Rep. Ken Helm (D)	34	Washington County (Willamette)
Rep. John Lively (D)	12	Springfield (Willamette)
Rep. Pam Marsh (D)	5	Ashland (Rogue)



# Oregon

Kate Brown, Governor

## Oregon Watershed Enhancement Board

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*Agenda Item G supports OWEB's Strategic Plan priority #3 – Community capacity and strategic partnerships to achieve watershed health.*



## MEMORANDUM

**TO:** Oregon Watershed Enhancement Board  
**FROM:** Meta Loftsgaarden, Executive Director on behalf of Ron Alvarado, NRCS Board Member  
**SUBJECT:** Agenda Item G – Water 4 Initiative  
January 15-16, 2019 Board Meeting

### I. Introduction

This report provides an overview of the Water 4 Initiative. Natural Resources Conservation Service (NRCS) Board member Ron Alvarado and staff from Intermountain West Joint Venture (IWJV) will provide an introduction to the program.

### II. Background

The IWJV has officially launched a new effort called the 'Water 4 Initiative'. Many organizations and agencies are seeking creative solutions regarding water use and conservation. The Water 4 Initiative will help lay the foundation by furthering efforts to conserve water resources, sustain key wildlife habitats (e.g., flood-irrigated wet meadows with high value to migratory birds) thereby reducing the likelihood of future Endangered Species Act (ESA) listings, support producers with improved forage production and passing on their operations to the next generation, improve alignment between at-risk fisheries and wildlife conservation, and strengthen rural communities.

The Water 4 Initiative is based on this simple premise: Conserving working wet meadows and "water for" agriculture, wildlife and fisheries habitat, groundwater recharge, recreation, and other services that matter to people. The Water 4 Initiative will initially be focused in key landscapes of Colorado, New Mexico, Oregon, California, Idaho, Wyoming, Utah, and Montana. The Water 4 Initiative focal areas were determined based on value to migratory birds, partnership spark, and investments of time, energy, and resources in collaborative conservation.

### III. Recommendation

This is an information item only provided by NRCS and IWJV.

### Attachments

- A. Water 4 Initiative Fact Sheet



# INTERMOUNTAIN WEST JOINT VENTURE **WATER 4 INITIATIVE**

*Conserving working wet meadows and “water for” agriculture, wildlife and fisheries habitat, groundwater recharge, recreation, and other services that matter to people*

The Intermountain West is mostly publicly owned but approximately 70% of its emergent wetlands occur on private land. These privately-owned habitats are typically associated with irrigated agriculture and occur on working ranches and farms in landscapes important to wildlife, native fish, and people.

Recent science and planning indicates that these agricultural lands, in certain landscapes, provide continentally important habitat for waterfowl and other waterbirds, and complement the habitat provided on State Wildlife Areas and National Wildlife Refuges. Yet these working wet meadows are under significant pressure due to urban and exurban growth, associated shifts in water policy, drought and changing environmental conditions, and in some landscapes, declining aquifers.

## **The Future of Water for People and Wildlife in the West**

The Intermountain West Joint Venture (IWJV) has developed the Working Wetlands & Water in the West (Water 4) Initiative to support agricultural producers, public land managers, and other partners with conservation on working lands in ways that matter to people, including improved forage production, higher quality wildlife-associated recreation, and enhanced groundwater recharge.

Here's our vision for the Water 4 Initiative:

- *Transfer and communicate lessons learned* from the Southern Oregon-Northeastern California (SONEC) Working Wet Meadows Initiative – a proven model for wildlife and agriculture – to other focal landscapes.
- *Catalyze proactive and strategic working wet meadows conservation* using the latest decision support tools to assess the availability of habitat in space and time linked to the needs of key species.
- *Identify new conservation program opportunities and funding sources* to support wet meadows conservation on working lands.
- *Build partnerships* among agricultural and conservation organizations.
- *Catalyze communications* to help the agricultural community tell the story of the value of working wet meadows in the Intermountain West.

The IWJV is working to secure and leverage funding to build the conservation delivery capacity at the landscape level, in key focal areas, as needed to facilitate flood-irrigation infrastructure improvement, working lands conservation easements, floodplain and fish habitat restoration, and improved water quality and quantity. Capacity building is a central IWJV tenet for **meeting people where they are** in rural communities of the West. We will measure success through increased delivery of conservation outcomes that matter to priority species and people.





## Where Wetlands and People Come Together

The goal of the Water 4 Initiative is to build collaborative capacity to deliver effective, lasting, and community-based conservation in strategic landscapes. The following landscapes are existing models of an optimal mix of ecological and social elements including: value to migratory birds, wetland abundance, public-private landownership patterns, partnership spark and synergy, and investments at the local level.

- Southern Oregon-Northeastern California (including the Klamath Basin)
- Upper-Middle Rio Grande corridor
- Eastern Idaho/High Divide landscape
- Bear River watershed

## Partnerships in this Initiative

The IWJV has created a Water 4 Initiative Coordinator position through a pooled funding arrangement to lead and fully develop the initiative. The following partners have pledged financial commitments to this initiative, to date:

- IWJV
- FWS Region 6 Refuges
- Oregon NRCS
- Colorado NRCS
- FWS Region 6 Regional Director
- New Mexico Game & Fish Department
- FWS Region 1 Refuges
- FWS Region 1 Ecological Services
- DU Great Plains Regional Office



The IWJV is launching this new initiative in Fall 2018 and will be seeking partner contributions for capacity building in 2019.



INTERMOUNTAIN WEST  
JOINT VENTURE  
1001 South Higgins Avenue, Suite A1  
Missoula, MT 59801  
(406) 549-0732 info@iwjv.org  
iwjv.org



July 11, 2018





# Oregon

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*Agenda Item H supports OWEB's Strategic Plan priority #6: Coordinated monitoring and shared learning to advance watershed restoration effectiveness.*



## MEMORANDUM

**TO:** Oregon Watershed Enhancement Board  
**FROM:** Renee Davis, Deputy Director  
Ken Fetcho, Effectiveness Monitoring Coordinator  
**SUBJECT:** Agenda Item H – Effectiveness Monitoring Funding Requests  
January 15-16, 2019 Board Meeting

### I. Introduction

Staff request the board approve funding for several effectiveness monitoring request to help OWEB and its local and agency partners to address effectiveness monitoring and performance tracking needs around the state.

### II. Conservation Reserve Enhancement Program (CREP) – Performance Tracking

The Oregon CREP Program is a cooperative venture between the State of Oregon and the Farm Services Agency, with technical support from the Natural Resources Conservation Service and local implementers. The program restores riparian areas on agricultural lands to benefit fish, wildlife, and water quality. Landowners who voluntarily enroll in CREP receive annual rental payments and state and federal cost-share incentives to install approved conservation measures, such as planting riparian vegetation and installing fencing and livestock water facilities.

As a follow-up from the CREP effectiveness monitoring study that was completed in 2017, OWEB staff and local CREP technicians have been exploring the development of monitoring tracking tools to track performance of CREP practices over time and to help ensure landowners are achieving maintenance and performance requirements of their CREP contracts. OWEB has recruited two CREP technician leads—one from western Oregon and one of from eastern Oregon—to help develop a monitoring checklist in consultation with other CREP specialists that will be tested on a subset of contracts in 2019. Findings will inform next steps to implement CREP performance tracking.

Staff request up to \$25,000 from the Open Solicitation programmatic effectiveness monitoring line item in the board's spending plan to develop and pilot a performance tracking approach for CREP.

### III. Middle Fork John Day River Intensively Monitored Watershed Monitoring

The Upper Middle Fork John Day Intensively Monitored Watershed (IMW) has been conducting work in the area in a coordinated fashion to evaluate and documents watershed restoration action and resulting ecological findings since 2008.

There are two principle areas within the IMW study boundary where large-scale effectiveness monitoring methods have been employed: Camp Creek and the main stem of the Middle Fork John Day River.

In the 2008 and 2014 field seasons, there were 10 sites selected in the Camp Creek sub-watershed to be surveyed; 15 sites in the Middle Fork John Day River were monitored in 2009 and 2014. Monitoring data collected at these locations is being used to evaluate the watershed study area's overall status and trends of critical habitats that have been the focus of restoration actions over the last 10 years. Change detected from these sites can reflect the individual restoration actions and other contributing factors such as: forest management, land use changes, high water events, wild fires, etc. Information gathered through this work complements the on-going evaluation through the IMW. The Malheur National Forest provides valuable cash match to this monitoring effort.

Staff request up to \$75,000 from the Open Solicitation programmatic effectiveness monitoring line item in the board's spending plan to support the effectiveness monitoring program associated with the Middle Fork John Day River IMW.

#### **IV. 'Telling the Restoration Story'**

Funded by the board in April 2018, "Telling the Restoration Story" is a new, targeted grant offering that helps OWEB and grantees better communicate outcomes from restoration work. These grants support compilation, analysis, and/or interpretation of existing data from a watershed restoration project, and production of outreach materials that describe outcomes. Products will reach a broad audience, ranging from the board and restoration practitioners, to landowners and legislators.

To date, several retrospective restoration stories are under development:

- Special fish passage techniques for sensitive species in Warner Lakes Basin;
- Willanch Creek Restoration in the Coos Watershed;
- Stream restoration treatments in West Fork Smith River;
- Deer Creek floodplain enhancement in the McKenzie Watershed;
- Fish passage restoration in the Rogue Basin;
- Oak and wet prairie restoration in Coyote Creek, Willamette Valley; and
- Floodplain restoration in Meacham Creek.

Final products are expected by next summer. Any products completed sooner may be highlighted during OWEB's legislative budget presentation.

Based on the incredibly positive response to date from local partners for this offering, staff request an additional \$100,000 from the Open Solicitation programmatic effectiveness monitoring line item in the board's spending plan to pursue additional opportunities.

#### **V. Results Chain Support for New Implementation Focused Investment Partnerships (FIPs)**

In April 2016, the board awarded funding to the Bonneville Environmental Foundation (BEF) for FIP monitoring, including development of a progress monitoring framework for Implementation FIPs. BEF's work has created a practical and consistent framework for

measuring and communicating progress toward achieving implementation objectives (outputs) and predicted ecological results (outcomes). In addition to tracking and communicating progress, the framework is intended to be an effective tool to inform adaptive management of restoration initiatives by FIP partners.

The key elements of the progress monitoring framework are a results chain and a cross-walk matrix. The results chain is a graphical representation or model of the partnership's theory for how strategies are expected to produce long-term ecological impacts. The cross-walk matrix details key objectives related to implementation and ecological outcomes, along with associated indicators, to measure progress toward meeting those objectives.

BEF coordinated with the six Implementation FIPs that were awarded funding in January 2016 to complete results chains and crosswalks. These products were presented at the October 2017 board meeting and are being used to inform 1) supplemental FIP monitoring priorities and 2) development of progress tracking reports (see Director's Update, Item E-1).

The board will select the second set of Implementation FIPs at the January 2019 meeting. The current BEF grant includes funding to work with the newly selected FIPs between this spring to develop results chains and crosswalks. To ensure the new FIP partnerships have the resources necessary to engage with BEF during this timeframe, staff is requesting the board delegate authority to the Executive Director to award up to \$48,000 from the Development FIP line item in the 2017-19 spending plan to support this work (see Item O-2, Implementation FIPs Kick-Off Funding staff report).

## **VI. Recommendation**

Staff recommend the board award:

- 1) Up to \$25,000 from the Open Solicitation Programmatic Effectiveness Monitoring line item in the 2017-19 spending plan to support grants that develop and pilot a performance tracking approach for CREP, and delegate to the Executive Director the authority to distribute the funds through appropriate agreements with an award date of January 15, 2019.
- 2) Up to \$75,000 from the Open Solicitation Programmatic Effectiveness Monitoring line item in the 2017-19 spending plan to support the effectiveness monitoring program associated with the Middle Fork John Day River Intensively Monitored Watersheds, and delegate to the Executive Director the authority to distribute the funds through appropriate agreements with an award date of January 15, 2019.
- 3) \$100,000 from the Open Solicitation Programmatic Effectiveness Monitoring line item in the 2017-19 spending plan to support grants for additional retrospective analyses to tell the restoration story, and delegate to the Executive Director the authority to distribute the funds through appropriate agreements with an award date of January 15, 2019.



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*Agenda Item I supports OWEB's Strategic Plan priority # 5: The value of working lands is fully integrated into watershed health.*

## MEMORANDUM

**TO:** Oregon Watershed Enhancement Board  
**FROM:** Meta Loftsgaarden, Executive Director  
Eric Williams, Grant Program Manager  
**SUBJECT:** Agenda Item I-1 – Oregon Agricultural Heritage Program (OAHF) Rules  
January 15-16, 2019 Board Meeting

### I. Introduction

The Oregon Agricultural Heritage Commission (OAHF) was established by law in 2017 to provide voluntary tools to protect and enhance working lands while maintaining or enhancing valuable fish and wildlife habitat and other natural resource values. The OAHF is nested under the Oregon Watershed Enhancement Board, and is tasked with developing program administrative rules for board adoption governing the grant programs authorized by statute. This includes grants for succession planning, developing and implementing conservation management plans, purchase of conservation easements and covenants, and technical assistance. This item requests board approval of OAHF rules.

### II. Background

The OAHF was appointed by the board on January 31, 2018, and held the first of eight public meetings to develop program rules on February 1, 2018. In June 2018, the OAHF released a draft set of program rules for public comment. Two public hearings were held, and in order to accommodate comments from boards and commissions who meet quarterly, the public comment period was extended through October 5, 2018. At its November 1, 2018 meeting, the OAHF developed responses to public comments and approved a revised version of the recommended program rules, which were posted for additional public comment. The OAHF received limited additional comments, made minor technical changes, and forwarded the proposed rules to the board for approval.

### III. Rule Content

The proposed rules include five divisions, as follows:

OAR 698-005 Administration, including provisions applicable to all programs;

OAR 698-010 Conservation Management Plans, including eligibility, plan components, evaluation criteria, and technical review for grants developing or implementing conservation management plans;



OAR 698-015 Working Land Conservation Covenants and Easements, including eligibility, application requirements, evaluation criteria, technical review, public involvement, and compliance requirements for grants to purchase conservation covenants and easements;

OAR 698-020 Working Land Technical Assistance Grants, which provide assistance to organizations that enter into conservation management plan agreements or that acquire working land covenants or easements; and

OAR 698-025 Succession Planning Grants, which help ensure the continued use of working lands for agricultural purposes when the land changes ownership.

With the rules in place, the OAHC will be poised to begin grant-making when funding is available.

#### **IV. Public Comment and Response**

In all, the OAHC received 157 comments from 17 entities. The comments resulted in significant revisions to the initial draft rules. Comments and OAHC responses to each comment are summarized in Attachment F.

#### **V. Recommendation**

Staff recommend the board adopt the administrative rules as revised by public comment and recommended by the OAHC.

#### **Attachments**

- A. OAR 698-005 Administration
- B. OAR 698-010 Conservation Management Plans
- C. OAR 698-015 Working Land Conservation Covenants and Easements
- D. OAR 698-020 Working Land Technical Assistance Grants
- E. OAR 698-025 Succession Planning Grants
- F. Summary of Public Comments

Division 005  
Oregon Agricultural Heritage Program Administration

**698-005-0010**

**Purpose**

These rules guide the Oregon Agricultural Heritage Commission and the Oregon Watershed Enhancement Board in fulfilling their duties in administering the Oregon Agricultural Heritage Program (OAHP) under the provisions of ORS 541.977-ORS 541.989. The OAHP includes grants for conservation management plans, working land conservation covenants and easements, technical assistance, and succession planning.

The purpose of OAHP is to contribute to the public benefits of:

- 1) Increased economic viability of Oregon's agricultural operations and economic sector;
- 2) Reduced conversion and fragmentation of Oregon's working land; and
- 3) Enhanced fish or wildlife habitat, water quality, and other natural resources on Oregon's working land.

**698-005-0020**

**Definitions**

- 1) "Agricultural landowner or operator" means a landowner, operator, manager or other person having responsibility for exercising control over the day-to-day operation of a farm or ranch.
- 2) "Board" means the Oregon Watershed Enhancement Board created under ORS 541.900.
- 3) "Commission" means the Oregon Agricultural Heritage Commission created under ORS 541.986.
- 4) "Conservation management plan" means specific actions planned for working lands to improve or maintain the agricultural and natural resource values. A conservation management plan is independent of a working lands covenant or easement.
- 5) "Conservation management plan holder" means an entity that is eligible to hold a conservation management plan that is or would be responsible for developing, implementing, monitoring or enforcing the agreement under an OAHP grant agreement.
- 6) "Conversion":
  - a. "Conversion" means:
    - i. Cessation of accepted farming practices;
    - ii. Construction of dwellings not occupied by farm operators or workers or other structures not related to agriculture;
    - iii. Removal of infrastructure required for accepted farming practices unless necessary to accommodate a change in accepted farming practices; or
    - iv. Cancelling or transferring rights to use water for irrigation in a manner that reduces the long-term viability of agriculture on the working land.

- b. As used in this definition, “accepted farming practices” shall have the meaning set forth in ORS 215.203(2)(c)
- 7) "Director" means the Executive Director of the Oregon Watershed Enhancement Board or the Executive Director’s designee.
  - 8) “Farming and ranching” means “farm use” as defined in ORS 215.203(2).
  - 9) “Fragmentation” means the division of a working farm or ranch, or the isolation of a farm or ranch from other agricultural operations and/or from the agricultural infrastructure necessary to bring farm products to their appropriate markets.
  - 10) "Grant agreement" means the legally binding contract between the Board and the grant recipient in which the Board is not substantially involved in the funded program or activity other than involvement associated with monitoring compliance with the grant conditions. It consists of the conditions specified in these rules, the notice of grant award, special conditions to the agreement, a certification to comply with applicable state and federal regulations, the project budget and the approved application for funding the project.
  - 11) “Grantee” means an organization or individual that is awarded a grant under one or more of OAHP’s grant programs.
  - 12) “Management plan” means a description of the stewardship, monitoring, and uses of working land intended to carry out the purposes of a working lands easement or covenant.
  - 13) "OWEB" means the Oregon Watershed Enhancement Board state agency.
  - 14) "Technical committee” means a team of individuals who have expertise relevant to the ranking of OAHP grants, or other issues before the Commission.
  - 15) “Working land” means land that is actively used by an agricultural owner or operator for an agricultural operation that includes, but need not be limited to, active engagement in “farm use” as defined in ORS 215.203(2).
  - 16) “Working land conservation covenant” means a nonpossessory interest in working land for a fixed term that imposes limitations or affirmative obligations for the purposes that support the use of the land for agricultural production and for the maintenance or enhancement of fish or wildlife habitat, water quality or other natural resource values.
  - 17) “Working land conservation easement” means a permanent nonpossessory interest in working land that imposes limitations or affirmative obligations for purposes that support the use of the land for agricultural production and for the maintenance or enhancement of fish or wildlife habitat, water quality or other natural resource values.

## 698-005-0030

### Application Requirements

- 1) Applications must be submitted on the most current form. Current applications will be made available on the OWEB website. An explanation must accompany the application if any of the information required on the application cannot be provided. In addition to the

information required in the application, an applicant may submit additional information that will aid the Commission in evaluating the project.

- 2) All applicants for Oregon Agricultural Heritage Program grants shall supply the following information:
  - a. Names, physical and email addresses, and telephone numbers of the applicant contact person(s) and the fiscal officer(s);
  - b. Name and address of participating agricultural landowners or operators;
  - c. Name and location of the proposed project. For conservation management plan and easement/covenant projects the location shall be described in reference to the public land survey, latitude and longitude using decimal degrees, North American Datum 1983, county, watershed, stream, or stream mile, as appropriate;
  - d. Estimated line item budget for the project using the most current budget form prescribed by the Commission. Current budget forms are available on the OWEB website;
  - e. Identification of specific project elements for which OAHP funds will be used;
  - f. A description of any non-OAHP funds, services or materials available or secured for the project and any conditions which may affect the completion of the project;
  - g. If the project is part of a multi-year project, and a new funding request continues a previously Commission-funded activity, a description of the previous project accomplishments and results as well as an accounting of past expenditures and revenues for the project;
  - h. Identification of volunteers and partners (if any) and the contribution they will make to the project;
  - i. A project schedule, including times of project beginning and completion; and
  - j. Any information requested that is necessary to evaluate the project based on the evaluation criteria for that project type.
- 3) Applications will be considered complete as submitted. Clarification of information may be sought from the applicant during the evaluation process but additional, new information will not be accepted after the application deadline.

#### **698-005-0040**

#### **Application Processing**

- 1) Project applications will be reviewed based on application completeness and the evaluation criteria adopted by the Board for each grant type in these rules.
- 2) The Commission may require additional information to aid in evaluating and considering a proposed grant project.

**698-005-0050****Grant Agreement Conditions**

- 1) The Board will enter into new grant agreements with prior grantees only if all reporting obligations under earlier agreements have been met.
- 2) If the grant agreement has not been fully executed by all the parties within one year of Board approval, funding shall be terminated. The money allocated to the grant shall be available for reallocation by the Board.
- 3) The Director shall establish grant agreement conditions for each grant type. Grantees shall comply with all grant agreement conditions.
- 4) The grantee shall comply with all federal, state and local laws and ordinances applicable to the work to be completed under the agreement.
- 5) Upon notice to the grantee in writing, the Director may terminate funding for projects not completed in the prescribed time and manner. The money allocated to the project but not used will be available for reallocation by the Board.
- 6) The grantee will account for funds distributed by the Board, using project expense forms provided by OWEB.
- 7) The grantee will obtain all necessary permits and licenses from local, state or federal agencies or governing bodies and provide a copy of each permit or license to the Board.
- 8) The Board may place additional conditions in the grant agreement as necessary to carry out the purpose of the program, including:
  - a. An enforceable agreement by the agricultural landowner or operator for continued access by OWEB and its designees for monitoring the project after completion;
  - b. An enforceable agreement by the grantee to maintain the project for a period of time commensurate with the project approved by the Board;
  - c. An enforceable agreement to supply future reports on the project as required; and
  - d. Such other conditions as the Board deems appropriate to the particular circumstances of the project.
- 9) Rules and conditions in place at the time the grant is awarded shall govern throughout the term of the project unless changes are mutually agreeable to all parties.

**698-005-0060****Use of Restricted Funding**

The Board may accept contributions to the Oregon Agricultural Heritage Fund from any public or private source and may agree to any conditions for the expenditure of those contributions that are consistent with the purpose of the fund as specified in ORS 541.977 – ORS 541.989.

**698-005-0070****Distribution of Funds**

- 1) The Director may withhold payments to a grantee if there are significant and persistent difficulties with satisfying Board requirements.
- 2) Funds will be released upon presentation of a completed fund release request form accompanied by documents as determined by the Director, and proof of completion of specific work elements of the project as identified in the grant agreement.
- 3) Advance funds may be released upon presentation of a detailed estimate of expenses for up to 120 days. Within 120 days of the date of the advance check, receipts or invoices for the advance must be submitted, a justification to extend the advance must be approved, or the unexpended advance funds must be returned to the Commission. Additional funds will not be released until receipts for expenditures of previous fund releases are submitted, or an estimate of expenditures is approved by the Director.

**698-005-0080****Funding Decision Reconsideration by Board**

In the event that the Director determines a grantee has not met conditions imposed by the Board, the Director shall forward the determination in writing to the Board for its consideration. The grantee will be provided a copy of the written determination. The conditionally encumbered grant funds will remain encumbered until the Board either affirms the Director's determination or authorizes the continued encumbrance of all or part of the funds in accordance with a modified decision of the Board.

**Division 698-005-0090****Technical Committees**

In addition to technical committees established by the Commission to rank and evaluate conservation management plan and working land conservation covenant and easement grant applications, the Commission may establish any technical committees it considers necessary to aid and advise the Commission in the performance of its functions, in compliance with ORS 541.988(2).

**698-005-0100****Waiver and Periodic Review of Rules**

The Director may waive the requirements of Division 005 unless required by statute, when doing so will result in more efficient or effective implementation of the Oregon Agricultural Heritage Program. Any waiver must be in writing, included in the grant file to which the waiver applies, and reported to the Commission within a reasonable time. The administrative rules for the Oregon Agricultural Heritage Program shall be periodically reviewed by the Commission and revised as necessary and appropriate.

## Division 010

### Conservation Management Plans

#### 698-010-0010

##### Purpose

The purpose of a conservation management plan as defined in OAR 698-005-0020(4) is to develop and implement conservation measures or other protections for maintaining or enhancing fish or wildlife habitat, water quality or other natural resource values in a manner consistent with the social and economic interests and abilities of the agricultural landowner or operator. The plan may include provisions for addressing particular priorities related to natural resource values, including but not limited to soil, water, plants, animals, energy and human need considerations.

The Conservation Management Plan Grant Program funds the development, implementation, and monitoring of conservation management plans (plans) entered into by agricultural landowners or operators and conservation management plan holders to manage working land in a manner that contributes to the purpose of OAHP in OAR 698-005-0010.

#### 698-010-0020

##### Definition

- (1) "Mutual Modification" means a change to a conservation management plan that is:
  - a. Material to the plan as defined in Section 0120(5); and
  - b. Agreed to by the agricultural landowner or operator implementing the plan and the conservation management plan holder.
- (2) "Project" means the aggregate of eligible activities included in Section 0060 that comprise an application.

#### 698-010-0030

##### Eligibility

- 1) Eligible applicants for Conservation Management Plan Grants are:
  - a. Entities eligible to hold a conservation easement as defined in ORS 271.715, other than a state agency;
  - b. Watershed councils; and
  - c. Not-for-profit organizations other than a state agency.
- 2) Individual agricultural landowners or operators are not eligible to apply for a Conservation Management Plan Grant.

#### 698-010-0040

##### Application

Conservation Management Plan Grant applications shall:

- (1) Be consistent with OAR 698-005; and

- (2) Include the duration and any terminating events for the plan.

#### **698-010-0050**

##### **Match Contributions**

- 1) All applicants shall demonstrate that some portion of the proposal is being sought as match.
- 2) The following funds and activities qualify as match:
  - a. In-kind contributions to activities listed under OAR 698-010-0060;
  - b. Funding commitments made by others as a result of grant applicant efforts; and
- 3) The OWEB Director retains the discretion to determine whether specific proposed matching costs not specifically identified above can be recognized as qualifying matching costs.

#### **698-010-0060**

##### **Conservation Management Plan Activities**

- 1) Funding may be utilized to develop, implement, carry out or monitor conservation management plans.
- 2) If there is a stream on the project:
  - a) The planning process must present the agricultural landowner or operator with alternatives that address the local Agricultural Water Quality Management Area Plan goals in place at the time of plan preparation.
  - b) If the program pays for plan implementation, the selected alternative must address the local Agricultural Water Quality Management Area Plan goals at the time of plan implementation.

#### **698-010-0070**

##### **Term of Payment for Conservation Management Plan Implementation**

- 1) If an agricultural landowner or operator is reimbursed for the implementation of a conservation management plan, the plan must be for a term of at least 20 years and no more than 50 years.
- 2) If a plan is associated with a working land conservation covenant that would also be funded by OAHP, the term of the plan must be the same as the term of the covenant.

#### **698-010-0080**

##### **Conservation Management Plan Components**

At a minimum, conservation management plans must include:

- (1) A summary describing how the conservation management plan meets OAHP's purpose;
- (2) The contact and location information for the agricultural landowner or operator and conservation management plan holder;



- (3) Relevant background and context of the working land and operation;
- (4) Inventory, including site characteristics and current management;
- (5) Short- and long-term social, economic, and conservation goals of the agricultural landowner or operator;
- (6) Resource analysis and identification of resource and management concerns;
- (7) Identification of potential plan activities and a justification for the activities that were selected for implementation;
- (8) The implementation plan, including a budget;
- (9) If applicable, a maintenance plan for infrastructure associated with the plan that may affect neighboring lands if not maintained over time;
- (10) The expected agricultural, fish or wildlife, water quality or other natural resource outcomes, and related social outcomes of the plan once implemented;
- (11) How the conservation management plan will be evaluated and managed;
- (12) A conflict resolution protocol for the agricultural landowner or operator and the conservation management plan holder if the grant program would fund the implementation of the plan; and
- (13) The term of the plan.

#### **698-010-0090**

#### **Evaluation Criteria**

Conservation Management Plan Grant applications will be evaluated on:

- 1) The significance of the agricultural, natural resource, and related social values of the working land subject to the conservation management plan(s).
- 2) The extent to which implementation of the plan(s) would protect, maintain, or enhance farming or ranching on working land, including how implementation of the plan(s) would:
  - a) Maintain or improve the economic viability of the operation; and
  - b) Reduce the potential for future conversion or fragmentation of the property and surrounding working land
- 3) The extent to which implementation of the plan would protect, maintain, or enhance significant fish or wildlife habitat, water quality, or other natural resource values by:
  - a) Protecting, maintaining, or improving the land, including soil, water, plants, animals, energy, and human needs considerations;
  - b) Supporting implementation of the Oregon Conservation Strategy, Oregon's Agricultural Water Quality Management Program, or other local, regional, state, federal or tribal priorities or plans that support fish or wildlife habitat, water quality, or other natural resource values;
  - c) Protecting, maintaining or improving the quality and connectivity of wildlife habitat on and around the working land subject to the plan;

- d) Protecting, maintaining, or improving water quality or quantity; and
  - e) Sustaining ecological values, as evidenced by the conservation management plan or inherent site condition.
- 4) The extent to which implementation of the plan(s) would protect, maintain or enhance significant agricultural outcomes, benefits, or other investment gains, including the regional significance of the agricultural operation, or its suitability based on soils, slope, location or other relevant factors.
  - 5) The capacity and competence of the prospective conservation management plan holder to enter into and (if implementation funding is awarded) monitor and carry out implementation of a conservation management plan, including:
    - a) The financial capability to manage the plan(s) over time;
    - b) The demonstrated relevant commitment, expertise, and track record to successfully develop, implement, carry out, and monitor plan(s); and
    - c) The strength of the conservation management plan holder as measured by effective governance.
  - 6) The extent to which the benefit to the state may be maximized, based on:
    - a) The ability to leverage grant moneys from other funding sources;
    - b) The duration and extent of the conservation management plan, with a preference for longer term agreements if implementation funding is awarded; and
    - c) The potential for setting an example that will encourage additional working land projects.
  - 7) The impacts of plan implementation on owners or operators of neighboring lands, including:
    - a) A plan for communicating with neighboring owners and operators once a conservation management plan is ready to be implemented about how to mitigate potential impacts; and
    - b) A maintenance plan for infrastructure that may impact neighboring lands if not maintained over time.
  - 8) The level of threat of conversion or fragmentation of the working land.

#### **698-010-0100**

##### **Technical Review and Funding Process**

- (1) Technical review of Conservation Management Plan Grant applications shall occur based on information provided in the grant application and technical review team expertise about the area and the project. The Commission shall appoint one or more technical committees to evaluate and rank applications for grants for conservation management plans. Those rankings will be provided to the commission to inform the commission's final ranking and funding recommendations to the OWEB board.
- (2) Applications shall be evaluated according to criteria described in OAR 698-010-0090.

- (3) The ranking system shall provide for the ranking of conservation management plans alone and not as part of an application that includes a working land conservation covenant or easement.
- (4) The technical committee(s) shall provide ranking recommendations to OWEB staff. OWEB staff will review technical committee recommendations and provide funding recommendations to the Commission.
- (5) The Commission shall review and consider the recommendations of the technical committee(s) and consult with the Board concerning grant applications.
- (6) The Commission shall make funding recommendations to the Board based on the availability of funding from the Oregon Agricultural Heritage Fund.
- (7) The Board approves Conservation Management Plan Grants. The Board may fund a grant application in whole or in part.

#### **698-010-0110**

##### **Grant Agreement Conditions**

- (1) Grant funding is subject to the signed statement of understanding and agreement by the participating agricultural landowner(s) or operator(s) to the roles and responsibilities under the conservation management plan.
- (2) All conservation management plan grant agreements for conservation management plan development authorized by the Board shall have a clause that requires the retention of up to 10 percent of project funds until the final report, as required in the grant agreement, has been approved. Any unexpended program funds must be returned to the Commission.
- (3) The grantee must agree to complete the project as approved by the Board and within the timeframe specified in the grant agreement unless proposed amendments are submitted and approved by the Director prior to the beginning of any work proposed in the amendment.
- (4) The Director will consider project amendments, including expansion of funded projects with moneys remaining from the original project allocation, if the purpose and intent of the amendment remains the same as the original project.
- (5) All changes to the conservation management plan must be reflected in writing and provided to the Commission.

#### **698-010-0120**

##### **Conservation Management Plan Mutual Modification**

If funding is provided for conservation management plan implementation:

- (1) Any changes to conservation management plans must achieve the same or greater level of benefits as the original plan, as evaluated by the criteria in OAR 698-010-0090.
- (2) Conservation management plans must include provisions that provide for flexibility and allow for mutual modification as necessary to reflect changes in practices or circumstances.

- (3) Any change in the conservation management plan must be mutually agreed to by both the agricultural landowner or operator and the conservation management plan holder.
- (4) To ensure consistent review of all conservation management plans, the conservation management plan holder and the agricultural landowner or operator must review the conservation management plan at least annually and may mutually modify the conservation management plan if necessary.
- (5) The agricultural landowner or operator must contact the conservation management plan holder immediately if any of the following changes occur that will impact either implementation of the conservation management plan or its expected outcomes:
  - (a) Changes in management or ownership of the property;
  - (b) Changes in the grazing or cropping system(s) not identified in the plan. For changes in grazing or cropping systems, the landowner must notify the conservation management plan holder in advance;
  - (c) A natural disaster occurs that will impact implementation of the conservation management plan; or
  - (d) Other changes that are outside the agricultural landowner's or operator's control.
- (6) The conservation management plan holder must contact the agricultural landowner or operator if changes in site conditions significantly affect the expected outcomes of conservation management plan implementation.
- (7) Modifications to the plan may include:
  - (a) The addition of new conservation practices, measures or benefits; or
  - (b) Changes to practices, measures, or benefits in response to:
    - i. Changes in management approaches based on new scientific understanding of expected outcomes;
    - ii. Changes in management or ownership of the working land;
    - iii. Changes in the grazing or cropping system;
    - iv. A natural disaster; or
    - v. Other changes outside the agricultural landowner's or operator's control.

### **698-010-0130**

#### **Conservation Management Plan Monitoring**

If funding is provided for conservation management plan implementation:

- (1) Notwithstanding (2), the conservation management plan holder must conduct at least one site visit to the property every three years, or as prescribed by a match funder if their interval for site visits is shorter than three years, to document the implementation of the conservation management plan.
- (2) The agricultural landowner or operator and the conservation management plan holder may agree to establish specific monitoring protocols and site visit intervals more

frequent than once every three years to identify trends in fish or wildlife habitat, water quality or other natural resource values, and must establish protocols if a modification of the conservation management plan results in specific monitoring or site visit needs. Protocols must be in writing and agreed to by both the agricultural landowner or operator and the conservation management plan holder. The Commission may provide guidance for consistent monitoring protocols.

- (3) The Commission or its designees may conduct spot checks to ensure management plan implementation as identified in the plan and associated reporting. The agricultural landowner or operator shall allow site access to the Commission, OWEB, or their contractors or representatives upon reasonable notification by the Commission.
- (4) The Commission may also develop monitoring protocols to evaluate the outcomes of conservation management plan implementation on a programmatic level.

#### **698-010-0140**

##### **Grant Reporting Requirements**

- 1) For grants that include funding for conservation management plan implementation:
  - a. At least once per year, the agricultural landowner or operator must meet with the conservation management plan holder and provide this holder with a written report of the conservation management plan activities completed that year on a form approved by the Commission. Reports may also include photo points or other methods that appropriately track plan implementation.
  - b. Annual reporting must identify any mutual modifications to the conservation management plan.
  - c. Reports must be submitted to the Commission on a date set by the Commission.
- 2) Upon development of a conservation management plan or completion of conservation management plan implementation, the grantee will provide the Commission and OWEB's Board with a copy of the project completion report. Final project accounting and reporting are due no later than 60 days following the project completion date specified in the grant agreement.
- 3) Upon receipt of the final report, the Commission shall have 90 days to approve the completed report or notify the grantee of any concerns that must be addressed or missing information that must be submitted before the report is considered complete and reviewed for approval. Once the final report has been approved, the final payment shall be promptly processed.

#### **698-010-0150**

##### **Waiver and Periodic Review of Rules**

The Director may waive the requirements of Division 010 unless required by statute, when doing so will result in more efficient or effective implementation of the Conservation Management Plan Grant Program. Any waiver must be in writing, included in the grant file to which the waiver applies, and reported to the Commission within a reasonable time. The

administrative rules for Conservation Management Planning Grants shall be periodically reviewed by the Commission and revised as necessary and appropriate.

## DIVISION 015

### Working Land Conservation Covenants and Easements

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#### **698-015-0010**

##### **Purpose**

The purpose of a working land conservation covenant or easement is to preserve and protect the continued use of a working land for agricultural purposes, and maintain or enhance fish or wildlife habitat, water quality, or other natural resource values on the land.

Covenants and easements funded under this program:

- 1) Must contribute to the public benefits in OAR 698-005-0010; and
- 2) Must provide for carrying out a purpose of a conservation easement, as defined in ORS 271.715.

#### **698-015-0020**

##### **Definitions**

- 1) “Project” means the aggregate of eligible activities included in sections 0060 and 0070 that comprise an application.
- 2) “Stewardship” means monitoring, maintaining, managing, and improving land protected by an easement or covenant, including providing signage, controlling access, providing enforcement actions and resolving violations.
- 3) “Stewardship fund” means a restricted fund that is used to cover the holder’s long-term costs for stewardship of the land protected by the covenant or easement and payment of taxes and insurance associated with that land. If the funding source allows investment of stewardship funds, funds may be used for investment management costs. Stewardship funds may not be used for overhead or indirect costs.

#### **698-015-0030**

##### **Eligible Applicants**

Eligible applicants for Working Land Conservation Covenant and Easement Grants are holders as defined in ORS 271.715 other than state agencies. Individual owners of working land are not eligible to apply for a Working Land Conservation Covenant and Easement Grant.

#### **698-015-0040**

##### **Eligible Properties**

Eligible properties for Working Land Conservation Covenant and Easement Grants are working lands as defined in ORS 541.977(2).

#### **698-015-0050**

##### **Application**

- 1) In accordance with ORS 541.977(3) and (4), OWEB may consider Working Land Conservation Covenant and Easement Grant applications to acquire a nonpossessory interest in working land for a permanent or fixed term that imposes limitations or affirmative obligations.
- 2) Working Land Conservation Covenant and Easement Grant applications shall:



- a. Be consistent with OAR 698- 005;
  - b. Be submitted on the most current form and process prescribed by the Commission;
  - c. State the amount and type of match contribution; and
  - d. If the application is for a covenant, include the duration of the covenant.
- 3) If the covenant is identical in duration to a conservation management plan for the working land that is funded by the OAHP Conservation Management Plan Grant Program, the covenant must refer to the conservation management plan in the text of the covenant.
  - 4) If there is a stream on the project, the covenant or easement application shall describe how either the easement or the management plan and associated monitoring addresses the local Agricultural Water Quality Management Area Plan goals. Easement monitoring shall include any riparian monitoring identified in the application.
  - 5) If a pre-existing or new conservation management plan is proposed as part of an application for a covenant or easement under this program, the proposed plan must be agreed to by the landowner, applicant, and commission before closing.
  - 6) The Commission may consider proposals that are received for covenants or easements that were acquired by the applicant after the previous application deadline.

#### **698-015-0060**

##### **Match Contributions**

- 1) All applicants shall demonstrate that at least 25% match is being sought, based on the total OAHP grant request for the covenant or easement project.
- 2) The following funds and activities qualify as match:
  - a. In-kind contributions to activities listed under OAR 698-015-0070;
  - b. Funding commitments made by others as a result of grant applicant efforts;
  - c. A donated portion of a sale; and
  - d. Funds deposited in a stewardship fund before the time that OWEB funds are released for acquisition of the covenant or easement.
- 3) The OWEB Director retains the discretion to determine whether specific proposed match contributions not specifically identified above can be recognized as qualifying match.

#### **698-015-0070**

##### **Use of Grant Funds**

Working Land Conservation Covenant and Easement Grant funds may be applied towards costs related to purchasing, implementing, holding, monitoring, stewarding, or enforcing the covenant or easement, including:

- 1) The purchase price and the purchase option fees associated with the working land conservation covenant or easement:
  - a. The purchase price for easements shall be based on an appraisal and review appraisal completed in accordance with applicable appraisal standards, including the Uniform Standards of Professional Appraisal Practice, and if

required by other funding sources or the Internal Revenue Service, the Uniform Appraisal Standards for Federal Land Acquisitions.

- b. The purchase price for covenants shall be based on an assessment of fair market value using methodologies similar to those described in OAR 698-015-0070 (1)(a);
- 2) The interest on bridge loans needed to secure closure on the property prior to when funding will be available for distribution through the program;
- 3) The staff costs incurred as part of the covenant or easement acquisition process related to the property;
- 4) The cost of due diligence activities, including appraisal, environmental site assessment, survey, title review, and other customary due diligence activities;
- 5) The cost of baseline inventory preparation;
- 6) The legal fees incurred;
- 7) The closing fees, including recording and title insurance costs;
- 8) The cost of securing and maintaining the agriculture and conservation values associated with the property in accordance with the application or a conservation management plan approved by the Director; and
- 9) Up to 50% match for the value of a stewardship fund, but program funds contributed to a stewardship fund may not exceed 5% of the total appraised value of the covenant or easement.

#### **698-015-0080**

##### **Terms of Covenants and Easements**

- 1) A working land conservation easement shall last in perpetuity.
- 2) A working land conservation covenant shall last for a term of no less than twenty and no more than fifty years.
- 3) The covenant term shall be set at 12-month increments only and not partial years.
- 4) The first day of the term of a covenant shall be the date that both of these events have occurred:
  - a. The covenant holder and the owner of working land conveying the covenant sign the agreement; and
  - b. The owner of working land has received Working Land Conservation Covenant and Easement Grant funding from this program for the covenant.

#### **698-015-0090**

##### **Evaluation Criteria**

Working Land Covenant and Easement Grant applications will be evaluated on:

- 1) The significance of the agricultural, natural resource, and related social values of the working land subject to the working land conservation covenant or easement.
- 2) The extent to which the working land conservation covenant or easement would protect, maintain, or enhance farming or ranching on regionally significant working land, including:

- a) Reducing the potential for future conversion or fragmentation of the property and surrounding working land;
  - b) Maintaining or enhancing the ability of the land to be in productive agricultural use after the covenant or easement is in place;
  - c) The potential viability of the property for agriculture; and
  - d) Improving or maintaining the economic viability of the operation, including future transfer of ownership.
- 3) The extent to which the covenant or easement would protect, maintain or enhance significant fish or wildlife habitat, water quality or other natural resource values by:
- a) Protecting, maintaining, or improving the land, including soil, water, plants, animals, energy, and human needs considerations;
  - b) Supporting implementation of the Oregon Conservation Strategy, Oregon's Agricultural Water Quality Management Program, or other local, regional, state, federal or tribal priorities or plans that support fish or wildlife habitat, water quality or other natural resource values;
  - c) Protecting, maintaining, or improving the quality and connectivity of wildlife habitat on and around the working land;
  - d) Protecting, maintaining, or improving water quality and/or quantity; and
  - e) Implementing a management plan that is likely to sustain ecological values, as evidenced by a management plan, easement or covenant terms, or inherent site condition.
- 4) The extent to which the covenant or easement would protect, maintain or enhance significant agricultural outcomes, benefits or other agricultural or conservation values important to the region, including:
- a) The parcel's contribution to long-term conservation of the region's agricultural land base; and
  - b) The regional significance of the agricultural operation, or its suitability based on soils, slope, location or other relevant factors, and its associated infrastructure.
- 5) The capacity and competence of the applicant and the proposed easement or covenant holder to purchase, accept, implement, hold, monitor, steward, and enforce a working land conservation covenant or easement, including:
- a) Accreditation from the Land Trust Accreditation Commission, or implementation of standards and practices that are similar to an organization that is eligible for accreditation;
  - b) Inclusion of working land preservation in the organization's mission, vision or other organizational documents;
  - c) The financial capability of the organization to steward conservation covenants and easements over time;
  - d) Demonstrated relevant commitment, ability, expertise, and track record to purchase, accept, implement, hold, monitor, steward, and enforce conservation covenants and easements or other relevant projects; and

- e) The strength of the organization as measured by effective governance.
- 6) The extent to which the benefit to the state from the investment may be maximized, based on:
  - a) The ability to leverage grant moneys with other funding sources;
  - b) The duration and extent of the agreement, with a preference for longer term agreements;
  - c) The cumulative effect of similar conservation or agricultural investments in the community, including other OAHF funded plans, covenants, or easements;
  - d) Consistency with local comprehensive plans and statewide planning goals;
  - e) The potential for setting an example that will encourage additional working lands projects in the region; and
  - f) The existence and implementation of a conservation management plan.
- 7) The impacts of the covenant or easement or the associated conservation management plan on owners or operators of neighboring lands, and the extent to which there is a plan of engagement with neighboring landowners about how to mitigate any impacts resulting from the covenant or easement, if necessary.
- 8) The level of threat of conversion or fragmentation of the working land.
- 9) The soundness of the legal and financial terms of the proposed real estate transaction.

#### **698-015-0100**

##### **Technical Review and Funding Process**

- (1) The Commission shall appoint one or more technical committees to evaluate and rank applications for grants for working land conservation covenants and easements. Those rankings will be provided to OWEB staff. OWEB staff will review technical committee recommendations and provide funding recommendations to the commission
- (2) Applications shall be evaluated according to criteria described in OAR 698-015-0090.
- (3) The Commission shall review and consider the recommendations of OWEB staff and consult with the Board concerning grant applications.
- (4) The Commission shall make funding recommendations to the Board based on the availability of funding from the Oregon Agricultural Heritage Fund.
- (5) The Board approves Working Land Conservation Covenant and Easement Grants. The Board may fund a grant application in whole or in part.

#### **698-015-0110**

##### **Board Approval and Delegation of Authority**

- 1) The Commission shall recommend and the Board shall approve grants in accordance with guidance adopted by the Board and made available to the public.
- 2) The Director is delegated the responsibility of ensuring that funding conditions required by the Board are fully satisfied by the grantee.

- 3) Conditionally approved grant funds shall be encumbered for disbursement only after all conditions are fulfilled. The encumbered funds may be made available for other uses by OWEB if all conditions required by the Board are not satisfied within 18 months of the conditional Board approval, unless recommended by the Commission and approved by the OWEB Board.

#### **698-015-0120**

##### **Public Involvement**

The public shall be provided with meaningful opportunities to comment on grant applications being considered by the Board or Commission. In a manner consistent with this requirement, the governing bodies of cities and counties with jurisdiction in the area of the proposed covenant or easement acquisition, as well as affected governmental agencies and tribes, will be provided with written notice of the Board's or Commission's intent to consider:

- 1) Written comments received prior to the Board or Commission meeting at which the Board or Commission will consider the application;
- 2) Comments made at public hearings held and publicized in accordance with ORS 271.735; and
- 3) Comments made at the Board or Commission meeting at which the grant application is considered.

#### **698-015-0130**

##### **Director Funding Approval and Distribution of Funds**

(1) The Director may approve the distribution of grant funds. Funds may be distributed throughout the time between approval by the Board and the covenant or easement closing as the following conditions are met:

- a. A grant agreement is executed by the Director and the grantee that includes a signed statement of understanding and agreement to the roles and responsibilities under the working land conservation covenant or easement by the participating owner of working land;
- b. The funding conditions, if any, imposed by the Board are satisfied to the full satisfaction of the Director;
- c. The legal and financial terms of the proposed real estate transaction are approved by the Director;
- d. The required title restrictions are approved by the Director;
- e. The Director has reconciled conditionally approved funding with actual project costs;
- f. The grantee has satisfied the match requirements under OAR 698-015-0060;
- g. The Board is notified in writing of the Director's intent to hold or recover the grant funds pending Board consideration under OAR 698-015-0140(1).

(2) For grants established under these rules, the Director is authorized to reimburse the grantee for allowable costs identified in OAR 698-015-0070 and to recognize match

contributions under OAR 698-015-0060 that were incurred no earlier than 18 months before the applicable grant application deadline.

#### **698-015-0140**

##### **Compliance and Enforcement**

- 1) The ongoing use of the property encumbered by a covenant or easement that received funding from the Working Land Conservation Covenant and Easement Grant Program shall be consistent with the purposes specified in ORS 541.977-ORS 541.989. If significant compliance issues cannot be resolved to the full satisfaction of the Director, the Director, after informing the Commission and the Board and providing reasonable written notice to the Grantee, may in his or her discretion initiate any and all legal remedies available to OWEB, including recovery of the OAHP grant funds that were used to purchase the covenant or easement, and reasonable interest and penalties at the option of the Director.
- 2) OWEB and its designees will be provided sufficient legal access to property encumbered by a covenant or easement acquired with OAHP funds, given reasonable notice, for the purpose of completing covenant or easement inspections.

#### **698-015-0150**

##### **Grant Reporting Requirements for Covenants**

Upon completion of the term of a working land conservation covenant, the grantee will provide the Commission and OWEB's Board with a copy of the project completion report. Final project accounting and reporting are due no later than 60 days following the project completion date.

#### **698-015-0160**

##### **Payment Relationship Between Covenants and Easements**

If a working land conservation covenant is funded through the Oregon Agricultural Heritage Program and a later application is submitted to the Commission for the same property for a working land conservation easement:

- 1) If the term of the covenant has not expired, the fair market value of the easement will be reduced by a proportion equivalent to the time remaining on the covenant.
- 2) If the term of the covenant has expired, no reduction of fair market value will be taken for the subsequent easement.

#### **698-015-0170**

##### **Subsequent Conveyances**

If a covenant or easement acquired with OAHP funds is subsequently transferred, it must:

- 1) Be made subject to prior approval by the Commission; and
- 2) Strictly comply with the requirements of ORS 541.977 – ORS 541.989 and OAR 698-010 and OAR 698-015.

#### **698-015-0180**

##### **Waiver and Periodic Review of Rules**

The Director may waive the requirements of Division 015 unless required by statute, when doing so will result in more efficient or effective implementation of the Working Land

Conservation Covenant and Easement Grant. Any waiver must be in writing, included in the grant file to which the waiver applies, and reported to the Commission within a reasonable time. The administrative rules for Working Land Conservation Covenant and Easement Grants shall be periodically reviewed by the Commission and revised as necessary and appropriate.



## Division 020 Working Land Technical Assistance Grants

### 698-020-0010

#### Purpose

The purpose of technical assistance grants is to provide assistance to organizations that are eligible to enter into agreements resulting in conservation management plans, or that acquire or propose to acquire working land conservation covenants or working land conservation easements. Grant funding must support the public benefits in OAR 698-005-0010.

### 698-020-0020

#### Definitions

(1) "Technical assistance" means supporting the development of working land projects or programs as described in ORS 541-981 and division 010 (conservation management plans) and ORS 541-982 and division 015 (working land conservation covenants and easements).

(2) "Young or beginning farmer or rancher" means someone who has been an agricultural landowner or operator for 10 consecutive years or fewer, or an agricultural landowner or operator who is 35 years old or younger.

(3) "Socially disadvantaged farmer or rancher" means an agricultural landowner or operator who is a member of a group whose members have been subjected to racial or ethnic prejudice because of their identity as members of a group without regard to their individual qualities. Those groups include African Americans, American Indians or Alaskan natives, Hispanics, and Asians or Pacific Islanders.

(4) "Veteran farmer or rancher" means a person who served in United States Army, Navy, Marine Corps, Air Force, and Coast Guard, including the reserve components thereof, and who was discharged or released therefrom under conditions other than dishonorable.

(5) "Limited Resource Farmer or Rancher" means an applicant with direct or indirect gross farm sales that are not more than the current indexed value in each of the previous 2 years, and who has a total household income at or below the national poverty level for a family of four, or less than 50 percent of county median household income in each of the previous 2 years. An entity or joint operation can be a Limited Resource Farmer or Rancher if all individual members independently qualify.

### 698-020-0030

#### Eligibility

- 1) Eligible applicants for Technical Assistance Grants are eligible to enter into agreements resulting in a conservation management plan under division 010 or acquire a working land conservation covenant or easement under division 015.
- 2) Individual agricultural landowners or operators are not eligible to apply for a Technical Assistance Grant.

**698-020-0040****Application Requirements**

Technical Assistance Grant applications shall be consistent with OAR 698-005.

**698-020-0050****Technical Assistance Activities**

- 1) Technical Assistance Grant funding cannot be used to fund specific conservation management plans, working land conservation covenants, or working land conservation easements.
- 2) The Commission will only consider technical assistance projects that will lead to or are likely to lead to the development of conservation management plans, working land conservation covenants, or working land conservation easements.

**698-020-0060****Evaluation Criteria**

Technical Assistance Grants will be evaluated on:

- 1) The extent to which the proposal will improve upon the ability of the entity or its partners to enter into conservation management plans, or acquire working land conservation covenants or easements.
- 2) The extent to which the outcomes of the technical assistance project would lead to activities that:
  - a. Protect, maintain, or enhance farming or ranching on working land;
  - b. Protect, maintain, or enhance significant fish or wildlife habitat, water quality, appropriate seasonal water flows, appropriate water retention, or other natural resource values;
  - c. Protect, maintain, or enhance significant agricultural outcomes, benefits, or other investment gains;
  - d. Maximize the benefit to the state based on the ability to leverage grant moneys; and
  - e. Limit negative and maximize positive impacts on owners or operators of neighboring lands.
- 3) The extent to which the applicant demonstrates a plan to engage one or more underserved populations, including young or beginning farmers or ranchers, socially disadvantaged farmers or ranchers, veteran farmers or ranchers, or limited resource farmers or ranchers.

**698-020-0070****Technical Review and Funding Process**

- 1) Applications shall be evaluated according to criteria described in OAR 698-020-0060.
- 2) The Commission shall appoint one or more technical committees to evaluate and rank applications for grants for working land conservation covenants and easements. Those rankings will be provided to the commission to inform the commission's final ranking and funding recommendations to the OWEB board.

- 3) If a technical committee is used, the technical committee shall provide ranking recommendations to OWEB staff, who will review technical committee recommendations and provide funding recommendations to the Commission. If a technical committee is not used, OWEB staff will provide funding recommendations to the Commission.
- 4) The Commission shall make funding recommendations to the Board based on the availability of funding from the Oregon Agricultural Heritage Fund.
- 5) The Board approves Technical Assistance Grants. The Board may fund a grant application in whole or in part.

#### **698-020-0080**

##### **Grant Agreement Conditions**

- 1) The grantee must agree to complete the project as approved by the Board and within the timeframe specified in the grant agreement unless proposed modifications are submitted and approved by the Director prior to the beginning of any work proposed in the modification.
- 2) The Director may consider project modifications, including expansion of funded projects with moneys remaining from the original project allocation, if the purpose and intent of the amendment remains the same as the original project and the proposed activity is within the same geographic area.
- 3) The Director may authorize minor changes within the scope of the original project plan.
- 4) The grantee must submit a report at completion of the project in accordance with reporting requirements described in the grant agreement.
- 5) Rules and conditions in place at the time funding for the Technical Assistance Grant is formally approved shall govern throughout the term of the project unless changes are mutually agreeable to both parties.

#### **698-020-0090**

##### **Waiver and Periodic Review of Rules**

The Director may waive the requirements of Division 020 unless required by statute, when doing so will result in more efficient or effective implementation of the Technical Assistance Grant program. Any waiver must be in writing, included in the grant file to which the waiver applies, and reported to the Commission within a reasonable time. The administrative rules for Technical Assistance Grants shall be periodically reviewed by the Commission and revised as necessary and appropriate.

## Division 025 Succession Planning Grants

### 698-025-0010

#### Purpose

The purpose of succession planning is to help ensure the continued use of working lands for agricultural purposes when the land changes ownership. The Oregon Agricultural Heritage Commission may provide funding recommendations to the Oregon Legislative Assembly, or recommendations for grant funding to the Oregon Watershed Enhancement Board, to provide training and support to agricultural landowners or operators or persons advising them regarding succession planning for the lands. Recommendations and grant funding must support the program purpose in OAR 698-005-0010.

### 698-025-0020

#### Definitions

- (1) "Agricultural cooperative" means a cooperative corporation formed in accordance with the Oregon Cooperative Corporation Act for the benefit of agricultural landowners or operators.
- (2) "Succession planning" means an ongoing process for ensuring the continuation and economic viability of a business over generations of owners or operators. It may include strategies to identify, develop, and empower the next generation of owners or operators, a plan to transfer business and family assets, and arrangements for each generation's retirement and long-term care. Succession plans are fluid and may be reviewed and updated throughout the existence of the business.

### 698-025-0030

#### Applicant Eligibility

- (1) Eligible applicants for Succession Planning Grants are:
  - (i) Public institutions of higher learning,
  - (ii) Nonprofit entities,
  - (iii) Political subdivisions of the state that are not state agencies,
  - (iv) Tribes, and
  - (v) Agricultural cooperatives.
- (2) Individual agricultural landowners or operators and individual persons or business entities not listed above that are advising them are not eligible to apply for a Succession Planning Grant.

### 698-025-0040

#### Application Requirements

Succession Planning Grant applications shall:

- (1) Not require match contributions; and
- (2) Comply with Oregon Agricultural Heritage Program general grant application requirements in OAR 698-005.

#### **698-025-0050**

##### **Eligible Activities**

The following activities benefitting agricultural landowners or operators in Oregon and the persons who advise them are eligible for Succession Planning Grants:

- (1) Education and outreach about the importance of succession planning and available resources;
- (2) Trainings on topics related to succession planning;
- (3) Development and distribution of educational materials and curriculum related to succession planning; and
- (4) Advising agricultural landowners or operators on succession planning.

#### **698-025-0060**

##### **Evaluation Criteria**

Succession Planning Grant applications will be evaluated on:

- (1) The extent to which the proposed project would help achieve the purpose of this grant program as identified in OAR 698-005-0010;
- (2) The capacity and competence of the applicant to deliver the proposed program;
- (3) The applicant's relevant background and experience in delivering successful succession planning programs, including prior projects funded through this or other grant programs.
- (4) The cost-effectiveness of the proposed project;
- (5) The extent to which the application reaches diverse audiences, including: producers of diverse commodities, agricultural landowners or operators in diverse geographic locations in Oregon, young or beginning farmers or ranchers, socially disadvantaged farmers or ranchers, veteran farmer or ranchers, limited resource farmers or ranchers, and participants in diverse stages of succession planning. The Commission may also consider the extent to which a suite of approved grant projects will combine to reflect this diversity; and
- (6) The extent to which the project introduces participants to conservation tools as resources for succession planning.

#### **698-025-0070**

##### **Succession Planning Grant Application Technical Review and Funding Process**

- (1) The Commission may fund projects submitted through an open solicitation for applications, or by requesting applications from one or more specific eligible entities.

- (2) Applications shall be evaluated according to criteria in OAR 698-025-0060.
- (3) The Commission shall appoint one or more technical committees to evaluate and rank applications for grants for working land conservation covenants and easements. Those rankings will be provided to the commission to inform the commission's final ranking and funding recommendations to the OWEB board.
- (4) The Commission shall make funding recommendations to the Board based on the availability of funding from the Oregon Agricultural Heritage Fund.
- (5) The Board may fund a grant application in whole or in part.

#### **698-025-0080**

##### **Grant Agreement Conditions**

- (1) The grantee must agree to complete the project as approved by the Board and within the timeframe specified in the grant agreement unless proposed modifications are submitted and approved by the Director prior to the beginning of any work proposed in the modification.
- (2) The Director will consider project modifications, including expansion of funded projects with moneys remaining from the original project allocation, if the purpose and intent of the amendment remains the same as the original project.

#### **698-025-0090**

##### **Grant Funding Conditions**

- 1) All Succession Planning Grant agreements authorized by the Board shall have a clause that requires the retention of up to ten percent of project funds until the final report, as required in the grant agreement, has been approved.
- 2) Final reports are due within 60 days of project completion. Any unexpended OAHF funds must be returned to the Commission with the final report.
- 3) Upon receipt of the final report, the Commission shall have 90 days to approve the completed report or notify the Grantee of any concerns that must be addressed or missing information that must be submitted before the report is considered complete and reviewed for approval.
- 4) Once the final report has been approved the final payment shall be promptly processed.

#### **698-025-0100**

##### **Grant Reporting Requirements**

- (1) Upon project completion, the grantee will provide the Commission and OWEB's Board with a copy of the project completion report. Final project accounting and reporting are due no later than 60 days following the project completion date.
- (2) The project completion report and annual reports shall demonstrate how the grantee's funded project(s) demonstrated clear succession planning benefits to Oregon

agricultural landowners or operators and their service providers. Evidence of this may include, but is not limited to:

- (i) The number of people who participated in the program;
  - (ii) The geographic, commodity, and other demographic indicators of participation in the program;
  - (iii) Documented improved understanding of succession planning by program participants;
  - (iv) Documented measurable changes in behavior of participants, including the percentage or number of agricultural landowners or operators who take the next step toward succession planning, complete a plan, and implement the plan;
  - (v) Documented improved understanding by participants of tools to reduce conversion or prevent fragmentation of working land, and promote economic viability and ecological sustainability of agricultural operations; and
  - (vi) Other documentation of the project's success in contributing to achieve the purpose of this grant program.
- (3) The Director or the Commission may authorize an independent performance audit of any Succession Planning Grant grantee. The Director may restrict future grant funds if the Director determines the grantee is not complying with the rules of the Succession Planning Grant Program.
- (4) In addition to project reports, the Commission may conduct program evaluations that may include:
- a. Changes in USDA Census of Agriculture or similar data that would indicate a change in adoption of succession planning by Oregon agricultural landowners or operators;
  - b. Surveys of agricultural landowners or operators on the status of succession plans; or
  - c. Other trends in working land ownership and use.

#### **698-025-0110**

##### **Waiver and Periodic Review of Rules**

The Director may waive the requirements of Division 025 unless required by statute, when doing so will result in more efficient or effective implementation of the Succession Planning Grant Program. Any waiver must be in writing, included in the grant file to which the waiver applies, and reported to the Commission within a reasonable time. The administrative rules for Succession Planning Grants shall be periodically reviewed by the Commission and revised as necessary and appropriate.



**Rules: General Comments**

Commenter(s)	Comments	OAHC Recommendation	
		Response	Rule Change
Pete Schreder <sup>1</sup> , Lake County Rancher <i>Oral Comment, at Burns Hearing 7/17/18</i>	Mr. Schreder is excited about the support features for ranch succession planning, including helping the next generation update their operations and make them more productive. OAHF seems to be a good, comprehensive package of programs with menus that landowners can explore. It can help preserve conservation efforts and tie conservation back into the rural communities that are vital to supporting this work. It will be important to have regional review teams who know local agriculture to diversify projects. And it is important to have a regional contact who can explain the program to landowners and organizations so it actually gets used and is not too daunting.	Thank you for your comment. Consistent with OWEB's grantmaking process, review team membership will represent diverse geographies and areas of expertise.	N/A  N/A
Coalition of Oregon Land Trusts (COLT), <i>Gen. Comm. #1</i>	COLT is excited to see a new program in Oregon that is designed to protect agricultural lands from fragmentation and conversion, and leverage the federal Agricultural Land Easement program. COLT applauds Oregon Agricultural Heritage Commission for shaping this program and for leading a conversation about the need to integrate conservation and working lands.	Thank you for your comment.	N/A
Coalition of Oregon Land Trusts (COLT), <i>Gen. Comm. #2</i>	COLT strongly encourages OWEB staff or a Commission-appointed body to walk through the proposed OAHF rules with staff from NRCS Oregon or their national office to ensure the intended complementary nature of the two programs are borne out in the OAHF rules.	NRCS has been engaged in the rulemaking and will be asked to review the final draft rules.	N/A
Coalition of Oregon Land Trusts (COLT), <i>Gen. Comm. #3</i>	COLT recommends that rules provide consistency in various purposes and definitions.	OWEB will work to create consistency in purposes and definitions.	Yes
Coalition of Oregon Land Trusts (COLT), <i>Gen. Comm. #4</i>	COLT supports changing the statute to "maintaining or enhancing fish or wildlife habitat, water quality, or other natural resource values on the land."	OWEB has proposed this statutory change, and it will be reflected in rule.	Yes
Department of Land Conservation and Development (DLCD), <i>Gen. Comm. #1</i>	DLCD expresses general support for OAHF, which can help access federal funding for the preservation of working agricultural lands and natural resources, including voluntary conservation easements and covenants that can be used to compliment land use regulations (especially Goals 3 and 5). Support for farm succession planning.	Thank you for your comment.	N/A
Department of Land Conservation and Development (DLCD),	DLCD recommends that the grant evaluation criteria not be eligible for waivers under OAR 698-005-0100, 698-010-0150, 698-015-0180, 698-020-0090, and 698-025-0120, to prevent the use of a waiver to approve grant applications in	Limitations on the Director's right of waiver address this issue. Rules state that: "The Director may waive the requirements ...	No

<sup>1</sup> All comments were submitted in writing, except for Pete Schreder's oral comment, recorded at the public hearing in Burns on 7/17/18

<i>Gen. Comm. #2</i>	locations that are inconsistent with statewide planning goals or local comprehensive plans, and/or locations that would not prevent fragmentation or conversion of working lands.	<u>unless required by statute...</u> ]” Since ORS 197.180 requires state agencies to take actions that comply with land use goals and rules, and are compatible with comprehensive plans and rules, this cannot be waived.	
East Multnomah Soil and Water Conservation District (EMSWCD) <i>Gen. Comm. #1</i>	EMSWCD offers general support for OAHP and the rulemaking process.	Thank you for your comment.	N/A
East Multnomah Soil & Water Cons. District (EMSWCD) <i>Gen. Comm. #2</i>	EMSWCD recommends that the evaluation criteria’s references to water quality be changed to read “maintaining existing acceptable water quality or improving unacceptable water quality.”	OWEB has proposed a similar statutory change: “the maintenance or enhancement of fish and wildlife habitat, water quality or other natural resource values.” It will also be reflected in rule.	Yes
East Multnomah Soil and Water Conservation District (EMSWCD) <i>Gen. Comm. #3</i>	EMSWCD recommends that OWEB review OAHP rules for consistency with ACEP-ALE to ensure the two programs operate in harmony. E.g., achieving the maximum enhancement of habitat value on a property might be achieved through the conversion of all/most farmland to another habitat type. And maximizing outcomes associated with some of OAHP’s purposes could create challenges in securing ACEP-ALE funding.	NRCS has been engaged in the rulemaking and will be asked to review the final draft rules.	N/A
East Multnomah Soil and Water Conservation District (EMSWCD) <i>Gen. Comm. #4</i>	EMSWCD asks the commission to consider designating some purposes as primary and some as secondary, stipulating that pursuit of the secondary purpose(s) may not conflict with or significantly diminish the primary purpose(s).	Prioritization of some values over others would conflict with the statute’s and commission’s intention to integrate agricultural and conservation objectives. Limited funding and ranking criteria will result in the funding of only projects with high agricultural <b>and</b> conservation values.	No
Friends of Family Farmers (FoFF)	FoFF is generally supportive of efforts to encourage family farm ownership and farmland conservation, as well as efforts to help farmland owners plan for succession as a means to support young, new, beginning, low-income, and socially disadvantaged farmers and ranchers gaining access to farmland.	Thank you for your comment.	N/A
McKenzie River Trust (MRT)	MRT appreciates the potential that OAHP has to transform the funding landscape and lead to meaningful conservation of Oregon’s valuable agricultural heritage.	Thank you for your comment.	N/A
National Young Farmers Coalition (NYFC)	NYFC applauds Oregon for creating a comprehensive package of programs that includes grants for conservation management plans and technical assistance and covenants and easements.	Thank you for your comment.	N/A
Oregon Department of	ODFW supports the development of new tools or programs to address the	Thank you for your comment.	N/A

Fish and Wildlife (ODFW) <i>Gen. Comm. #1</i>	challenges in a changing landscape, e.g. the critical need for succession planning, and recognizes the natural resource value that working lands provide, including fish and wildlife habitat.		
Oregon Department of Fish and Wildlife (ODFW) <i>Gen. Comm. #2</i>	ODFW encourages OWEB and the OAH Commission to discuss how the Department's Wildlife Habitat Conservation and Management Program (WHCMP) or the Riparian Lands Tax Incentive Program (RLTIP) (ORS 308A and OAR 635-430) can be integrated or improved upon with the implementation of the OAHP to support and strengthen the tools available, and needed, for working land conservation.	OWEB will work with ODFW to schedule a presentation and discussion for the OAH commission on these programs at a future meeting of the commission.	N/A
Oregon Department of Fish and Wildlife (ODFW) <i>Gen. Comm. #3</i>	ODFW requests at least one Department representative to participate on the technical committee(s) for evaluating and ranking conservation management plans and working land conservation covenants and easements.	Consistent with OWEB's grantmaking process, review team membership will represent diverse areas of expertise, including ODFW as appropriate.	N/A
Southern Oregon Land Conservancy	This is a great program and we support it fully. We hope that it receives funding and results in projects with long-lasting benefits.	Thank you for your comment.	N/A
WaterWatch	WaterWatch states that, if public funds are to be distributed to conservation projects, OWEB should ensure that the projects result in demonstrable public environmental benefits. WaterWatch states that the rules as currently written do not ensure this.	The evaluation criteria were designed by the commission to ensure that the grant programs provide public and environmental benefits.	No
Yamhill Soil and Water Conservation District	Give the highest priority and consideration to applications that: 1) ensure lands remain in agricultural production, and 2) provide protections for the longest timeframe possible, with the highest priority given to projects that provide permanent protection with conservation easements.	The evaluation criteria are designed to maintain the viability of agricultural operations. 698-015-0090(6)(b) prioritizes the duration and extent of the agreement, with a preference for longer term agreements.	No
Oregon Board of Agriculture <i>Gen. Comment #1</i>	The Board strongly believes the OAHP's main focus should be on working lands. While we believe implementing conservation management plans and improvements to soil health, water quality and fish and wildlife habitat are important objectives, the integration of conservation values with the protection of agricultural lands as working lands is critical to the OAHP success.	The commission agrees.	N/A
Oregon Board of Agriculture <i>Gen. Comment #2</i>	Because most Oregon farmers and ranchers have little experience in the use of easements today, ensuring that information about the program is disseminated in a form that is accessible and understandable will be critical in developing the trust needed in an easement program involving working lands. The Board recognizes that rules inherently can be lengthy documents however simplifying the rules, where possible, and ensuring the materials and forms available to producers are simple and easily filled-out is vital to building that trust.	OWEB agrees and will take this into account when developing guidance, forms, and other materials supporting the program.	N/A
Oregon Board of	Additionally, the Board was extremely interested in how the Commission and	OWEB agrees that regional expertise is	N/A

Agriculture <i>Gen. Comment #3</i>	the Oregon Watershed Enhancement Board (OWEB) would use regional review teams to analyze and evaluate issues related to “regional significance” and other agricultural criteria. The Oregon Department of Agriculture (ODA) has expertise and connections to the agriculture community in all regions of the State. We strongly encourage and recommend that OWEB and the Commission utilize that expertise in the development of any regional review teams.	required among technical review teams and will seek input from ODA regarding membership.	
Oregon Board of Agriculture <i>Gen. Comment #4</i>	Likewise, the Board requests OWEB work with ODA staff on several outstanding definitional questions we have.	OWEB will work with ODA staff on definitional questions.	Follow-up required
Oregon Association of Conservation Districts <i>Gen. Comment #1</i>	First, the variety of conservation strategies OAHP will support through its four grant foci (Conservation Management, Covenants and Easements, Technical Assistance, and Succession Planning) is critical to achieving conservation goals in Oregon. We commend OWEB and the Commission for supporting multiple approaches and stages of conservation. While OAHP's emphasis on easements and covenants is important for encouraging the longevity of conservation practices, the value of other technical assistance and conservation planning on working lands should not be underestimated.	Thank you for your comment.	N/A
Oregon Association of Conservation Districts <i>Gen. Comment #2</i>	Second, we strongly support the emphasis, throughout the OAHP rules, on monitoring the on-site conditions of funded projects. Site-specific monitoring is critical to ensuring conservation practices are achieving desired goals, and to continuing to improve the work of the many state and local partners in the Oregon Action Plan, the U.S. Fish and Wildlife Candidate Conservation Agreement and Assurances program, mitigation credits, and other conservation programs in Oregon. Monitoring is essential to making informed decisions about how to most effectively and efficiently dedicate resources in these efforts. We applaud OWEB and the Oregon Agricultural Heritage Commission's inclusion of monitoring in the eligible activities for grant funding throughout OAHP.	Thank you for your comment.	N/A
Oregon Farm Bureau and Oregon Cattlemen’s Association <i>Gen. Comment #1</i>	We are among the original supporters of this program and write to express our general support for the rules developed by the Commission.	Thank you for your comment.	N/A
Oregon Farm Bureau and Oregon Cattlemen’s Association <i>Gen. Comment #2</i>	Decision-Making Authority (throughout): For all three programs, the role of the Commission in reviewing and ranking applications for funding appears to be much more limited than our statutory intent. When we helped design the OAHP, it was intended that the Commission would be charged with reviewing and ranking the applications, taking into the account the recommendations of	The rule was changed to make it clear that the commission has the final authority to recommend funding of projects.	Yes

	<p>any technical advisory committees and staff. The make-up of the Commission was created with this purpose in mind, to ensure that we had an appropriately crafted body making the final call about which projects should move forward. The draft rules are not clear that the Commission has the final authority to review, rank, and fund applications regardless of the recommendations made by the supporting committees and staff. For our organizations, it is critical that the Commission must have full authority decisions around ranking and funding. We recommend modifying the rules for CMPs, covenants and easements to clarify that the Commission has an independent obligation to review and make recommendations on grant applications under this program.</p>		
<p>Oregon Farm Bureau and Oregon Cattlemen’s Association <i>Gen. Comment #3</i></p>	<p>For CMPs, covenants and easements, we think it is critical that the grantee organizations have an agricultural mission, farmers and ranchers on their board, and experience working with farmers and ranchers in Oregon. Whether this appears in rule or guidance, we think that the background, interest, and experience of the grantee organizations must demonstrate a commitment to maintaining agriculture in Oregon and previous work with farmers and ranchers in the state.</p>	<p>OWEB agrees with the information outlined by OFB and will elaborate on the importance of farming and ranching expertise on staff and boards in program guidance.</p> <p>The CMP evaluation criteria include “the demonstrated relevant commitment, expertise, and track record to successfully develop, implement, and/or monitor plans” [698-010-0090 (5) (b)], which rewards applicant organizations who have experience working with farmers and ranchers.</p> <p>The covenant and easement criteria include both having a working land preservation mission and demonstrated expertise in holding, monitoring, stewarding, and enforcing working lands easements and covenants [698-015-0090 (5) (b) and (d)].</p>	N
<p>Oregon Farm Bureau and Oregon Cattlemen’s Association <i>Gen. Comment #4</i></p>	<p>Throughout the rules, there are references to the “proposed project.” This term is confusing, as it not entirely clear whether the project is something broader than a conservation management plan, covenant or easement or whether the broader project may be seeking a combination of OWEB funds under difference programs. OCA and OFB would prefer that instead of referencing a “proposed project,” the rules simply reference the proposed conservation management plan, covenant or easement as appropriate.</p>	<p>The intent of the word “project” is to include all eligible grant activities. For CMPs, eligible activities include developing, implementing, and monitoring plans; therefore, referring to just the plan is too narrow a reference. Similarly, for covenants and easements, eligible activities include a lengthy list of due diligence activities in addition to simply referencing the easement or covenant. To clarify, OWEB will include a definition of “project” in the rules.</p>	Yes

## Rules: Administrative Rules (OAR 698-005)

Commenter(s)	Comments	Staff Recommendation	
		Response	Rule Change
Department of Land Conservation and Development (DLCD)	DLCD recommends amending the definition of “fragmentation” include “conversion of working lands to uses not associated with commercial agriculture” or alternatively referencing “fragmentation or conversion” in all instances, similar to OAR 609-015-0090(2)(b) and (8).	OWEB will include “conversion” where “fragmentation” is named, with “conversion” listed before “fragmentation.” OWEB worked with DLCD to develop this definition of “conversion:” (1) (a) Cessation of accepted farming practices; (b) Construction of dwellings not occupied by farm operators or workers or other structures not related to agriculture; (c) Removal of infrastructure required for accepted farming practices unless necessary to accommodate a change in accepted farming practices; or (d) Cancelling or transferring rights to use water for irrigation in a manner that reduces the long-term viability of agriculture on the working land. (2) As used in this definition, “accepted farming practices” shall have the meaning set forth in ORS 215.203(2)(c); <b>ORS 215.203(2)(c)</b> (2)(c) As used in this subsection, “accepted farming practice” means a mode of operation that is common to farms of a similar nature, necessary for the operation of such farms to obtain a profit in money, and customarily utilized in conjunction with farm use.	Yes
Friends of Family Farmers (FoFF) <i>Admin. Comm. #1</i>	FoFF recommends amending 698-005-0010 to read “Increased economic viability of Oregon’s <u>family owned</u> agricultural operations and economic sectors.”	Family owned operations are a valuable component of agriculture, but the term “family owned” is too limiting for the various types of family business ownership that exist. The evaluation criteria will speak to the operation’s connection with the local community and economy, including ownership model.	No
Friends of Family Farmers (FoFF) <i>Admin. Comm. #2</i>	698-005-0010: FoFF recommends adding the additional public benefit of “(4) Increased economic viability and farm ownership opportunities for: (a) small- and medium-sized family farms and ranches, (b) beginning farmers or ranchers, (c) socially disadvantaged farmers or ranchers, and	The commission discussed this point extensively, and decided that the program should focus more on the land than the type of owners and operators. However, an application might point to such factors to demonstrate evaluation criterion #4 (agricultural	No, for this section of the

	(d) veteran farmers or ranchers.”	outcomes) for the CMP and covenant/easement program. The Technical Assistance Grant Program evaluation criteria (OAR 698-020-0060(3)) have been revised to include engaging these constituencies.	rules.
Friends of Family Farmers (FoFF) <i>Admin. Comm. #3</i>	698-005-0020: FoFF recommends the following definitions pertaining to the comment immediately above (from USDA programs): <ul style="list-style-type: none"> <li>• <b>“Family farms,”</b> are defined as farms in which the members of the family are primarily responsible for daily physical labor and strategic management.</li> <li>• <b>“Small farms”</b> are family farms that on average generate less than \$500,000 in gross annual sales.</li> <li>• <b>“Medium-sized farms”</b> are family farms that on average generate up to \$1 million in gross annual sales.</li> <li>• <b>“Beginning farmers or ranchers”</b> have owned or operated a farm or ranch for not more than 10 years, are under 35 years of age, and are actively engaged in farming.</li> <li>• <b>“Socially disadvantaged farmers and ranchers”</b> are those who are members of a group that that have been subjected to racial, ethnic, or gender prejudice because of their identity as members of a group without regard to their individual qualities.</li> <li>• <b>“Veteran farmers or ranchers”</b> are those who have served in the Armed Forces and who have (a) not operated a farm or ranch or (b) operated a farm or ranch for no more than 10 years.</li> </ul>	As above, the commission has decided that priorities for easements and covenants will focus on agricultural lands rather than types of owners and operators.	No, for this section of the rules.
Friends of Family Farmers (FoFF) <i>Admin. Comm. #4</i>	FoFF recommends limiting the definition of “agricultural owner or operator” (698-005-0020(1)) to those “actively engaged” in farming activities, i.e. they make significant contributions to the farming operation and participate in the daily physical labor and management of the farm.	See above. OAHF focuses on the land rather than type of owner. Such a provision could limit the extent of the program in unintended ways. For example, this provision would limit participation in grant programs by elderly and retired landowners or family trusts.	No
Friends of Family Farmers (FoFF) <i>Admin. Comm. #5</i>	FoFF recommends limiting the definition of “agricultural owner or operator” (698-005-0020(1)) to “individuals who are Oregon residents,” and exclude corporate entities or “persons,” e.g. out-of-state owned corporations and real estate investment trusts.	See above. OAHF focuses on the land rather than type of owner. Such a provision could limit the extent of the program in unintended ways. For example, this provision could disqualify a property from CMP funding if it is owned by an out-of-state owner but managed by an Oregonian operator.	No
Oregon Department of Fish and Wildlife (ODFW) <i>Admin. Comm. #1</i>	698-005-0020: ODFW recommends defining the terms “conservation management plan” and “conservation management plan holder.” It is unclear if the definition of “management plan” in working land conservation covenant and easement section (698-015-0020(1)) is intended to apply to the CMP section as well.	OAHF will use the definition of “management plan” for easements and covenants and move it to this Admin section of definitions applying to the entire statute. We added a definition of conservation management plan to distinguish between a CMP and	Yes



		an easement/covenant management plan. Eligible “holders” of conservation management plans are determined by the criteria in Section 0030.	
Oregon Department of Fish and Wildlife (ODFW) <i>Admin. Comm. #2</i>	698-005-0050(8)a-c: ODFW recommends clarifying if “commitment” is a formal written agreement. E.g. would it include a commitment to include some sort of legal access easement to allow spot checking by the grantor’s representatives to evaluate project efficacy over time?	The rules will clarify that this is an “enforceable agreement.” The specific conditions that the parties commit to would be described in the grant agreement.	Yes
Southern Oregon Land Conservancy (SOLC) <i>Admin. Comm. #1</i>	SOLC recommends that the commission consider fee title ownership of qualifying lands, for example for the option of a land trust to implement ground leases to farmers.	The OAHP statute does not authorize OWEB to fund fee title acquisitions.	No
Southern Oregon Land Conservancy (SOLC) <i>Admin. Comm. #2</i>	698-005-0010(3): SOLC supports enhancing fish and wildlife, but recommends a clearer definition in rules, e.g. purpose statement, definitions, and criteria which all have differing language. What happens in the event of an unforeseen conflict, e.g., between irrigation and water for fish?	Purpose statements will be revised for consistency.	Yes
WaterWatch <i>Admin. Comm. #1</i>	WaterWatch recommends adding definitions for: <ul style="list-style-type: none"> <li>• <b>Natural Resource Value</b>, as “other aspects of the natural environment,” clarifying intent to fund projects that benefit the environment, not e.g. extractive natural resource values</li> <li>• <b>Conservation and/or Conservation Measure</b>: tied to statutory purpose of “maintaining or enhancing fish or wildlife habitat, improving water quality or supporting other natural resource values” as opposed to e.g. an irrigation piping/lining project that does not go through the Oregon Conserved Water Act to dedicate legally protected instream water. Rules should require evidence of demonstrable benefits rather than assumptions e.g. that it will enhance stream flow.</li> <li>• <b>Conservation Management Plan</b>: WaterWatch finds no definition in legislative record and none in statute except CMP components (698-010-0080). Explain how CMPs interplay with other statutory plans (e.g. Water Management and Conservation Plans)</li> <li>• <b>Fish and wildlife</b>: understand the purpose is to protect/enhance habitat for native fish and wild animals</li> </ul>	There is no need to define natural resource values. As the comment explains, in context, this term refers to conservation because of the list it is in.  Conservation is clearly tied to the statutory definition of “maintaining or enhancing fish or wildlife habitat, improving water quality or supporting other natural resource values.” The Conserved Water Act is not applicable because the CMP grant program funds the plan implementation. Clarification on what will be funded in plan implementation will be provided in guidance.  A definition will be added to the statute (see above under Oregon Department of Fish & Wildlife #1). Evaluation criteria 698-010-0090(3)(b) asks applicants to describe interplay with other plans.  The definition of “fish and wildlife” is clear from context, but may be included in guidance.	No  No  Yes  No
WaterWatch <i>Admin. Comm. #2</i>	698-005-0030(2)(c): WaterWatch recommends that the location of the project also include information on the county and any stream (in addition to stream mile)	County is already included in the list, but rules will be revised to include stream.	Yes

WaterWatch <i>Admin. Comm. #3</i>	698-005-0050(3): WaterWatch recommends that Grant Agreement Conditions include remedies for if the project does not achieve the stated natural resource gains, e.g. return monies to the state.	Remedies exist within the conservation management plan itself, including annual monitoring and mutual modification, to ensure that the land is managed according to the plan.	No
Oregon Farm Bureau and Oregon Cattlemen's Association <i>Admin. Comm. #1</i>	Notice to Landowners (OAR 698-005-0030(3)): The rules state that where applications involve physical changes or monitoring on private land, the application must state that landowners have been informed that the monitoring results will be public. For this program, this requirement does not seem necessary or appropriate. All necessary monitoring should be conducted on the property of the landowner who has enrolled in the program, and we are unclear why monitoring would need to occur on land belonging to others. To ensure that agricultural landowners in Oregon generally feel positively about the program, we recommend deleting this section and limiting monitoring requirements to land owned by the landowner who is the subject of the application.	This rule was drawn from general OWEB program rules is less applicable to the types of projects that will be funded by OAHP. The rule was deleted.	Yes
Oregon Farm Bureau and Oregon Cattlemen's Association <i>Admin. Comm. #2</i>	Maintenance of the Project (OAR 698-005-0050(8)(b)): The rules contain a provision that authorizes the Board (not Commission) to place additional conditions on a grant agreement, including an agreement to maintain the project for a period of time deemed appropriate by the Board. This is a confusing requirement for this program. The program rules already state both minimum and maximum time periods for program participation based up whether the landowner seeks an easement, covenant or conservation management plan. It is unclear why the Board would need to designate an alternate timeframe, and it almost suggests they could designate a timeframe otherwise inconsistent with the rules. We recommend clarifying the intent of this section.	The Board rather than the commission is indicated in this section because it is the board that is legally responsible to execute the grant agreements to carry out the program. Regarding maintenance commitment, the intent is to run with whichever length of time is authorized by the particular grant project; we will clarify this rule.	Yes
Oregon Farm Bureau and Oregon Cattlemen's Association <i>Admin. Comm. #3</i>	Restricted Funding (OAR 698-005-0060): We are happy the fund can accept outside dollars from other programs or donors. However, we recommend adding "and ORS 541.977- ORS 541.989" to ensure that any funds accepted also must be consistent with the purposes of the statute.	The rules will be clarified to include reference to the statute.	Yes
Oregon Board of Agriculture <i>Admin. Comm. #1</i>	OAR 698-005-0020(5) defines the term "fragmentation." This term is used throughout the draft rule. As defined it focuses on the division of lands or isolation from other agricultural lands. The issue of conversion is much broader and involves more than "fragmentation." Land divisions and the orphaning of land from other agricultural operations are problematic however conversion relates to change of use that would render the land unsuitable for farm use. Urbanization, nonfarm	The rules will include define the terms "fragmentation" and "conversion" and both terms will be used throughout the rules.	Yes

	development, etc. also need to be a part of the equation.		
Oregon Board of Agriculture <i>Admin. Comm. #2</i>	OAR 698-005-0020(10) defines “working land” in relation to active management in “farming or ranching.” These terms are not defined anywhere. You might consider replacing “farming and ranching” with the term “farm use” as defined in ORS 215.203(2). This definition is used in other statutes (e.g. land use, taxation, right to farm) and is broadly understood and accepted. This would also promote consistency and compatibility with other programs geared towards protecting agricultural lands.	“Farm use” was added to the definition of “working land.”	Yes
Oregon Board of Agriculture <i>Admin. Comm. #3</i>	OAR 698-005-0030(b) and 0050(8)(a). Suggest clarification that “agricultural owners” means (or includes) agricultural land owners. As drafted, it could be interpreted to mean the owner of the operation which could exclude a land owner who rents or leases the land to someone else to farm from participating.	This change was made throughout the draft rules.	Yes

### Rules: Conservation Management Plan Grant Program Rules (OAR 698-010)

Commenter(s)	Comments	Staff Recommendation	
		Response	Rule Change
Friends of Family Farmers (FoFF)	698-010-0090: FoFF recommends evaluation criterion prioritizing projects that address the unique challenges of affordable access to land for (a) small- and medium-sized family farms and ranches, (b) beginning farmers or ranchers, (c) socially disadvantaged farmers or ranchers, and (d) veteran farmers or ranchers.	The Conservation Management Plan Grant program is not designed to address the affordability of agricultural land.	No
Myron, Jim	Mr. Myron recommends that establishing riparian buffers where no agricultural activities would occur be a requirement of every conservation management plan funded through the OAHP.	If there is a stream in the project area, the planning process must present the landowner with alternatives that help achieve the local Ag Water Quality Management Area Plan goals. If the program pays for plan implementation, the selected alternative must support implementation of the local Ag Water Quality Management Area Plan goals in place at the time of plan preparation and of plan implementation.	Yes

Oregon Department of Fish & Wildlife (ODFW) <i>CMP Comment #1</i>	698-010-0010(2)/0090(3): ODFW recommends additional clarification on how enhancement of fish or wildlife habitat would be evaluated. Potentially acknowledge existing programs to maintain working landscapes and support natural resource values, such as the Wildlife Habitat Conservation and Management Program.	Technical review teams will apply evaluation criteria for fish and wildlife habitat using OWEB's current grant review process. Guidance will elaborate on how to apply these criteria.	No
Oregon Department of Fish & Wildlife (ODFW) <i>CMP Comment #2</i>	698-010-0010: ODFW recommends clarifying the terms "energy" and "human need considerations", how they will be evaluated in relation to "addressing particular priorities related to natural resource values," and consider how to prioritize when energy and human need consideration conflict with natural resource values.	Recommended for guidance. The program is designed to integrate agricultural and conservation values.	No
Oregon Department of Fish & Wildlife (ODFW) <i>CMP Comment #3</i>	698-010-0080: ODFW recommends providing more detail on the preparation and content of a conservation management plan, e.g. what details of the site, such as habitat structure, should be included in the CMP inventory.	Recommend for guidance.	No
Oregon Department of Fish & Wildlife (ODFW) <i>CMP Comment #4</i>	698-010-0090: ODFW states that the capability and capacity evaluation criteria are robust and well thought out. The Department appreciates the consideration of supporting implementation of the Oregon Conservation Strategy, including a specific reference to connectivity of wildlife habitat, in the evaluation criteria.	Thank you for your comment.	N/A
Oregon Department of Fish & Wildlife (ODFW) <i>CMP Comment #5</i>	698-010-0120(7): ODFW requests clarification of the term "changes in science." Does it include habitat restoration techniques?	OWEB will change rules to read "changes in management approaches based on new scientific understanding of expected outcomes" and clarify in guidance.	Yes
Oregon Department of Fish & Wildlife (ODFW) <i>CMP Comment #6</i>	698-010-0120: ODFW recommends additional clarification on the modification process for the plan holder.	Recommended for guidance.	No
Oregon Department of Fish & Wildlife (ODFW) <i>CMP Comment #7</i>	698-010-0130: ODFW recommends clarification as to which instrument will guarantee access to site spot checks.	This will be included in the grant agreement.	No
Oregon Department of Fish & Wildlife (ODFW) <i>CMP Comment #8</i>	698-010-0130: ODFW supports development of monitoring protocols on a programmatic (e.g., regional approach) level, which would allow for a more thorough evaluation of the program. Site by site monitoring protocols may create some challenges with data collection to show efficacy of the program over time.	The commission will provide guidance for consistent monitoring protocols under sub-3, and may establish monitoring protocols to evaluate the outcomes of CMP implementation on a programmatic level under sub-4.	No
Southern Oregon Land Conservancy (SOLC) <i>CMP Comment #1</i>	SOLC offers strong support for funding management plans. Be sure to protect fish and wildlife habitats in CMP implementation.	Thank you for your comment. Maintenance and enhancement of fish and wildlife habitat is one of OAHP's goals, and part of evaluation criteria 3.	N/A

Southern Oregon Land Conservancy (SOLC) <i>CMP Comment #2</i>	698-010-0050: SOLC states that the flexibility in match amount is helpful.	Thank you for your comment.	N/A
WaterWatch <i>CMP Comment #1</i>	WaterWatch recommends splitting CMP rules into three subsections: (1) funding the development of a plan, (2) funding implementation of the plan and (3) funding monitoring. Each of these should have distinct requirements, with funding for the implementation of CMP projects needing the most specificity.	It is not the intent of statute or commission to establish separate criteria or requirements for each activity.	No
WaterWatch <i>CMP Comment #2</i>	698-010-0050: WaterWatch recommends, at least for implementation projects, requiring a specific minimum match. They state that the term “some portion” does not provide enough guidance.	The statute requires some cash match, but few match programs exist for CMPs. The commission wants to test implementation of the program prior to requiring a specific match percentage.	No
WaterWatch <i>CMP Comment #3</i>	698-010-0040/0090: WaterWatch recommends that applicants should have to provide evidence that the proposed project will enhance or protect fish or wildlife habitat, improve water quality or support other natural resources values.	Grant application evaluation criteria require consideration of “the extent to which implementation of the plan would protect, maintain, or enhance significant fish or wildlife habitat, improve water quality, or support other natural resource values.”	No
WaterWatch <i>CMP Comment #4</i>	689-010-0080: WaterWatch recommends looking at OAR 635-430-0040, Preparation and Content of a Wildlife Habitat Conservation and Management Plan as an example of what components as an example of additional requirements (e.g. maps identifying rivers/ponds/lakes, T/E species, vegetation types, description of objectives to be achieved, management practices to be used, etc.)	Staff will review OAR 635-430-0040 as an example of plan components and will include them in guidance as appropriate.	N/A
WaterWatch <i>CMP Comment #5</i>	698-010-0090(3)(a): WaterWatch states that the rules weaken the statutory protections for fish and wildlife habitat, improving water quality, or supporting other natural resource values by merging different directives of the statute into one single directive which, among other things, would allow human needs considerations to qualify as a natural resource value.	OAHP and the CMP grant program are designed to integrate agricultural and conservation values. The term “human needs” mirrors language in a federal program that could be a match.	No
WaterWatch <i>CMP Comment #6</i>	698-010-0090(3)(a): WaterWatch recommends that the rules include more parameters connected to protecting, maintaining or improving fish and wildlife habitat, improving water quality and supporting other natural resource values, e.g., if the landowner commits to put a project through the Conserved Water Act which will result in legally protected water instream, or commits to transferring water instream, this should garner high scores. See other funding sources for examples, e.g. SB 839.	Any information included in the grant application will be considered by the review team, but the grant evaluation process does not use numeric scoring.	No
WaterWatch <i>CMP Comment #7</i>	698-010-0090(3)(a): WaterWatch notes that the list includes some state programs/regulations but not all, e.g. it includes the Oregon Conservation	OWEB will change this section to read “(a) Protecting, maintaining, or improving the	Yes

	Strategy, but not the Conserved Water Act. The “catch all” phrase in (b) is not narrowed to habitat improvement plans/tools but would rank projects higher for conformance with any type of local, regional, state, federal or tribal priorities or plans. And it is not qualified by “including but not limited to”.	land, including soil, water, plants, animals, energy, or human needs considerations; (b) Supporting implementation of the Oregon Conservation Strategy, Oregon’s Agricultural Water Quality Management Program, or other local, regional, state, federal or tribal conservation priorities or plans <u>that support fish or wildlife habitat, water quality, or other natural resource values;”</u>	
WaterWatch CMP Comment #8	698-010-0090(3)(a): WaterWatch notes that the list is tied together by “and”, meaning that to score competitively, it would need to meet all the provisions on this list	OWEB will change the connector to “or.”	Yes
WaterWatch CMP Comment #9	698-010-0090(3)(e): WaterWatch states that it makes no sense that the CMP qualifies as evidence of sustaining ecological values. Same for “inherent site conditions”.	The grant review team will evaluate the plan and its stated outcomes. Monitoring will evaluate compliance with the plan, and mutual modifications allow for changes to the plan that support ecological outcomes.	No
WaterWatch CMP Comment #10	698-010-0090(1): WaterWatch recommends striking this section, since limiting the program to “significant” agricultural operations appears to conflict directly with the statute’s directive that the type of agricultural operation conducted on the working land cannot be considered in the ranking of a project, and “significance” is subjective.	The type of agricultural operation in ORS 541.984(4) refers to the type of agricultural products grown on the property. Ranking targets “significant” properties for grant funding, as demonstrated by each applicant, and elaborated on in guidance.	No
WaterWatch CMP Comment #11	698-010-0090(3): WaterWatech recommends that the rules provide for the evaluation of any negative, as well as positive, effects of a proposed conservation measure on fish/wildlife habitat, water quality, etc.	This is implied by the words “extent to which” at the beginning of the sentence.	No
WaterWatch CMP Comment #12	698-010-0100: WaterWatch recommends guidance as to the make-up of the technical review team, e.g. include ODFW, WRD, DEQ, and affected Indian Tribes and exclude project consultants.	This issue will be clarified in guidance.	N/A
WaterWatch CMP Comment #13	698-010-0100(1): WaterWatch recommends striking the requirement that the review be limited to information provided in the grant application, as it does not take into account technical review team expertise about the area and project.	The section was amended to include technical review team expertise about the area and the project.	Yes
Yamhill Soil and Water Conservation District CMP Comment #1	The criteria identified in section 698-010-009 include several categories and elements that should be considered. However, the rule provides no guidance of how individual criterion will be ranked. It would be useful to list the most important criterion or standards (e.g. Tier 1 Criteria) that must be met for an application to be considered. This might include item #2, #3, #4 and #8.	The commission discussed whether to give preference to specific evaluation criteria and decided that the goal is to fund projects that have the highest likelihood of success in achieving the purposes of the program. In	No

	Reviews could consider other criteria if the application addresses the Tier 1 Criteria. Ranking or weighing the criteria in this section will help applicants understand and focus on the most important factors for ranking.	that context, the commission decided that it would not be possible to pre-determine which evaluation criteria are more important than others in reaching this determination.	
Yamhill Soil and Water Conservation District <i>CMP Comment #2</i>	In section 698-010-009 item #4, the definition of "regional significance" should be defined. Item #5(c), includes in part, "... as measured by effective governance."  It is unclear how OWEB would evaluate effective governance. If this cannot be better defined or clarified in rule, then clarification should be provided in guidance documents.	The commission discussed regional significance at length and decided that due to the variation of working lands from region to region it would be difficult to adequately define the term for statewide application. The commission will rely on regional expertise on technical committees to help determine regional significance. The commission will develop guidance on evaluating effective governance.	No
Yamhill Soil and Water Conservation District <i>CMP Comment #3</i>	Section 698-010-0100. The OAHF has its primary focus on agricultural lands. The district suggests the rules specifically include the requirement to include representation from the Oregon Department of Agriculture and Oregon State University Extension Service on all technical committees.	While the commission intends to engage experts from ODA and OSU Extension on technical committees, it decided not to specify committee membership in rule. Generally, technical committee representation will be reflective of the commission membership, which includes both representatives selected by the Board of Agriculture and Extension, along with Land Conservation and Development Commission, Fish and Wildlife and OWEB.	No
Oregon Farm Bureau and Oregon Cattlemen's Association <i>CMP Comment #1</i>	Purpose of CMP (OAR 698-010-0010(2,3)): We would prefer that you leave subsections 2 and 3 in this section, as they add clarity and consistency to the purposes of CMPs.	The text retains the language of subsections (2) and (3)	N/A
Oregon Farm Bureau and Oregon Cattlemen's Association <i>CMP Comment #2</i>	Match Contributions (OAR 698-010-0050(2)(c)): This section seems to indicate that conservation management plans are an "acquisition of the property." They are simply a contract between the grantee and a landowner, so this section should be changed to reflect that CMPs are not acquisitions.	There is no section (2) (c) in the CMP rule; the provision cited is in Section 015 Covenants and Easements.	N/A
Oregon Farm Bureau and Oregon Cattlemen's Association <i>CMP Comment #3</i>	Reporting Requirements (OAR 698-010-0140(2)): This section requires accounting and reporting within 60 days of the project completion date. For CMPs, we are not clear which date would be the project completion date, or if that date would vary depending on the application. This may warrant	The rules will clarify that the project completion report is due 60 days after the project completion date listed in the grant agreement to ensure that the completion	Yes



	clarification.	date varies and would align with the individual project.	
Oregon Board of Agriculture <i>CMP Comment #1</i>	OAR 698-010-0090(2)(a) Evaluation criteria for conservation management plans. The term “fragmentation” should be redefined or teamed with the term “conversion” as found in other areas of the draft rule.	The definition of “conversion” was expanded and the term “conversion” combined with “fragmentation throughout the draft rules.	Yes
Oregon Board of Agriculture <i>CMP Comment #2</i>	OAR 698-010-0090(4) assesses the “regional significance” of an “agricultural operation.” This could be a very narrow consideration without better defining “operation.” Agricultural operations and practices can and do change. The suitability of land to be used for a “significant operation” is just, if not more important just what is the current operation character or use.	This was expanded to include suitability of soils, slope, location or other relevant factors.	Yes
Oregon Board of Agriculture <i>CMP Comment #3</i>	OAR 698-010-0090(8). Good use of the term “fragmentation” with the term “conversion.” See #1 and #4 above.	See CMP Comment #1 above.	Yes

### Rules: Covenant and Easement Rules (OAR 698-015)

Commenter(s)	Comments	Staff Recommendation	
		Response	Rule Change
Coalition of Oregon Land Trusts (COLT) <i>Cov/Ease Comm. #1</i>	COLT recommends that 698-015-0010 Purpose be changed to read “An <u>willing</u> agricultural owner <del>or operator</del> may enter into a working land conservation covenant (covenant) with or grant a working land conservation easement.” <b>Owner of working land:</b> A conservation easement or conservation covenant must be entered into by the person or entity listed on the title of a property; an agricultural operator, generally, does not have the legal authority to sign a conservation easement or covenant. This would also bring the rule into line with the corresponding ORS (541.982), which reads, “An owner of working land may enter into a working land conservation covenant with or grant a working land conservation easement ...” Adding “willing” here (or elsewhere in the rules) will help clarify that the OAH <b>Willing:</b> Program emphasizes that it is voluntary and accomplished through willing landowners. Land acquisition grants include this: “OWEB may consider grant applications that propose the acquisition of interests in lands from <b>willing</b> sellers for the purpose of...”	The purpose statement was completely revised so that it now reads as a purpose statement. The language in the comment was dropped from rule.	Yes
Coalition of Oregon Land Trusts (COLT) <i>Cov/Ease Comm. #2</i>	698-015-0020(3), 698-015-0060 and 698-015-0070: COLT recommends changing the term “stewardship endowment” to “stewardship fund” here and throughout. The word “endowment” refers to a very specific type of	OWEB will change “stewardship endowment” to “stewardship fund.”	Yes

	financial account, and we do not recommend the rules implicitly or explicitly require an “endowment” for land trusts or other entities to manage their stewardship funds.		
Coalition of Oregon Land Trusts (COLT) <i>Cov/Ease Comm. #3</i>	698-015-0020(3): COLT recommends that this be changed to read “...resolution of violations, <del>and</del> <u>or</u> any enforcement of the covenant or easement.” <ul style="list-style-type: none"> <li>Stewardship funds are meant to monitor and steward the conservation easement,</li> <li>Legal defense funds are meant to enforce or defend any potential violation matter involving a conservation easement.</li> </ul> <p>For some organizations, these are managed as the same fund, while for others they are different. Encourage commission and OWEB to discuss with COLT</p>	This language was incorporated in section 0070 to clarify that use of grant funds can be for any one of the components of stewardship.  OWEB will encourage the commission to discuss this distinction with COLT.	Yes          N/A
Coalition of Oregon Land Trusts (COLT) <i>Cov/Ease Comm. #4</i>	698-015-0050(1): COLT recommends making (1) consistent with the purpose sections contained in 698-015-0010 and refer to the overall purpose in 698-005-0010	OWEB will work to create consistency in purposes and definitions.	Yes
Coalition of Oregon Land Trusts (COLT) <i>Cov/Ease Comm. #5</i>	698-15-0050(4): COLT recommends reconsidering the requirement that a pre-existing or new management plan must be agreed to by the landowner, applicant, and commission before closing. Challenging to fulfill within 18 months.	While it is challenging to fulfill this requirement within 18 months, if it is not complete, a waiver may be granted.	No
Coalition of Oregon Land Trusts (COLT) <i>Cov/Ease Comm. #6</i>	698-015-0060: COLT recommends using the current language in OWEB’s land acquisition program rules (695-045-0175): “All applicants shall demonstrate at least 25% of the actual land acquisition project cost is being sought as match”.	To be consistent with OWEB programs, this language was amended to require that all applicants demonstrate that at least 25% match is being sought, based on the total OAHP grant request for the covenant or easement.	Yes
Coalition of Oregon Land Trusts (COLT) <i>Cov/Ease Comm. #7</i>	698-015-0060(3): COLT recommends that the match for stewardship section is better suited in the next section, 698-015-0070, Use of Grant funds.	OWEB will move this section.	Yes
Coalition of Oregon Land Trusts (COLT) <i>Cov/Ease Comm. #8</i>	698-015-0060(3): COLT recommends leaving it up to OWEB staff, the review team, and the Commission to determine reasonable grant funds for stewardship on a per project basis. 5% is arbitrary, stewardship doesn’t depend on appraisal value, but on other factors.	OWEB agrees that the amount of the fund is absolutely different based on each property. However, the Board needs to set some limit on what the contribution from the fund is. The commission believes that 5% of OAHP funding is reasonable for a stewardship fund.	No
Coalition of Oregon Land Trusts (COLT)	698-015-0070 (1)(b): COLT strongly recommends the Commission establish a methodology for appraising covenants, or establish a process to develop a	The commission is in the process of doing so.	For future

<i>Cov/Ease Comm. #9</i>	methodology to do so.		consideration.
Coalition of Oregon Land Trusts (COLT) <i>Cov/Ease Comm. # 10</i>	698-015-0090(4): COLT recommends that the language be changed to "...benefits or other agricultural or conservation <u>values</u> important to the region..."	OWEB will make this change.	Yes
Coalition of Oregon Land Trusts (COLT) <i>Cov/Ease Comm. 11</i>	698-015-0090: COLT recommends adding wording in this section similar to existing OWEB acquisition rules under 695-045-0180, where "the soundness of the legal and financial terms of the proposed real estate transaction" is considered in the application process.	OWEB will add "the soundness of the legal and financial terms of the proposed real estate transaction" to the covenant and easement ranking criteria.	Yes
Coalition of Oregon Land Trusts (COLT) <i>Cov/Ease Comm. #12</i>	698-015-0110(3): COLT recommends "Conditionally approved grant funds shall be encumbered for disbursement only after all conditions are fulfilled. The encumbered funds may be made available for other uses by OWEB if all conditions required by the Board are not satisfied within 18 months of the conditional Board approval, <u>unless approved by the OWEB director.</u> " For flexibility	OWEB will add "unless approved by the OWEB Board" to this section.	Yes
Coalition of Oregon Land Trusts (COLT) <i>Cov/Ease Comm. #13</i>	698-015-0130(1)(d): COLT notes that the section refers to title restrictions under OAR 698-015-0110, but it doesn't. The land acquisition program (695-045-0195) refers to title restrictions in ORS 541.960	OWEB will change this section to read "the required title restrictions are approved by the director."	Yes
Coalition of Oregon Land Trusts (COLT) <i>Cov/Ease Comm. #14</i>	698-015-0130(1)(g): COLT notes that the section refers to the Director's right to hold the grant funds pending Board consideration under OAR 698-015-0140, which refers to the director's ability to issue penalties, "including recovery of the OAHF grant funds." But it doesn't refer to withholding.	OWEB will make these provisions consistent: <ul style="list-style-type: none"> <li>• Add "recover" funds to 0130(1)(g)</li> </ul>	Yes
Coalition of Oregon Land Trusts (COLT) <i>Cov/Ease Comm. #15</i>	698-015-0170 (1): COLT recommends changing this section to read: "If the term of the covenant has not expired, the fair market value of the easement will be reduced by a proportion equivalent to the time remaining on the <u>easement covenant.</u> "	OWEB will make this change.	Yes
Coalition of Oregon Land Trusts (COLT) <i>Cov/Ease Comm. #16</i>	698-015-0170: COLT asks: What is the underlying concern and corresponding definition of "profit" in OAR 698-015-0020? Acknowledges that similar language appears in 695-045-0210. There is potential opportunity for a future landowner to steward the project.	This section was amended to address only the transfer of a covenant or easement. The reference to "cash" was omitted and the definition of "profit" deleted.	Yes
Department of Land Conservation and Development (DLCD) <i>Cov/Ease Comm. #1</i>	DLCD recommends that the proposed rule OAR 698-015-0090(6)(d) be amended to require grant awards for conservation easements and covenants to be consistent with local comprehensive plans and statewide planning goals.	OWEB will amend 0090(6)(d) to read "Consistency with local comprehensive plans and statewide planning goals"	Yes
Department of Land Conservation and Development (DLCD)	DLCD recommends that the proposed rules be amended to prioritize acquisition of conservation easements rather than covenants on rural lands whenever possible	698-015-0090(6)(b) already prioritizes the duration and extent of the agreement, with a preference for longer term agreements.	N/A

<i>Cov/Ease Comm. #2</i>			
Department of Land Conservation and Development (DLCD) <i>Cov/Ease Comm. #3</i>	If an easement is not possible, DLCD recommends that covenants be pursued on rural lands before conservation management plans, which provide relatively limited opportunities to prevent fragmentation and conversion of working lands.	The covenant and easement program, and the CMP program perform distinct functions. Also, the statute requires CMPs alone to be ranked separately from covenants/easements. ORS 541.984(3)	No
Department of Land Conservation and Development (DLCD) <i>Cov/Ease Comm. #4</i>	DLCD strongly encourages OAH and OWEB to adopt language prohibiting easements and covenants within Urban Growth Boundaries (UGBs) and urban reserves as this might otherwise reduce supplies of urban land planned for development and result in attempts to expand UGB boundaries into adjacent agricultural and forest lands, among other reasons.	See the response to comment #1 above. OAH will be implemented consistent with local comprehensive plans and statewide planning goals. Any projects inside a UGB or Urban Reserve would need to demonstrate consistency with land use laws.	No
East Multnomah Soil and Water Conservation District (EMSWCD) <i>Cov/Ease Comm. #1</i>	EMSWCD recommends that 698-015-0060(1) be modified to simply state that “a match must be sought,” since timeframes might make it impossible to have matching cash or agreement in hand at the time of OAH application.	OWEB will delete “as demonstrated by a formal application or agreement.”	Yes
East Multnomah Soil and Water Conservation District (EMSWCD) <i>Cov/Ease Comm. #2</i>	EMSWCD recommends that 698-015-0090(2) include evaluation criteria around the easement’s prospects for improving future farmland affordability (e.g. through limiting residential size or incorporating an Option to Purchase at Agricultural Value). And, going forward it would be instructive for OAH to track the sales of eased properties to identify impact of the easement (or covenant) on land values.	Applicants may describe the agricultural benefits for affordability and access in their narrative description for evaluation criteria 2 or 4. OWEB supports the evaluation of future sales of properties with covenants or easements to identify the impact of easements/covenants on land values.	No
East Multnomah Soil and Water Conservation District (EMSWCD) <i>Cov/Ease Comm. #3</i>	698-015-0090, 2, 3 & 4: EMSWCD recommends that the commission consider establishing <b>qualifying</b> criteria tied to the agricultural capability of a property, and qualifying criteria of a non-agricultural nature, e.g. enhancement of natural resource values, capacity or competence of the easement holder and benefit to the state.	The only qualifying criterion in rule is that the property must be working land to participate. Agricultural capabilities in different regions of the state are very different. Therefore, the ranking process will establish the agricultural (and natural resource) values.	No
East Multnomah Soil and Water Conservation District (EMSWCD) <i>Cov/Ease Comm. #4</i>	698-015-0090, 5(a): EMSWCD agrees that a considered and rigorous approach to land transactions and stewardship is vital, and yet that accreditation under the Land Trust Alliance is not the best fit for all organizations.	Thank you for your comment. OWEB agrees with this statement.	N/A
East Multnomah Soil and Water Conservation District (EMSWCD) <i>Cov/Ease Comm. #5</i>	698-015-0100, 4 – 8: EMSWCD asks the commission to consider ways to reduce the number of entities responsible for reviewing and making recommendations on program applications, while still maintaining appropriate and effective oversight. Similarly, for 698-015-0130(1)(c),	A streamlined system is established for the use of technical committees in the review of OWEB grant proposals.	N/A

	ensure that Director review and comment on specific transactions (e.g. proposed Purchase and Sale Agreements) does not have substantial timing implications for transactions.	OWEB will heed this advice.	
East Multnomah Soil and Water Conservation District (EMSWCD) <i>Cov/Ease Comm. #6</i>	698-015-0140(1): EMSWCD asks the commission to consider removing the allowance for OWEB to recapture grant funds and the ability to require punitive damages and instead work toward the satisfactory resolution of compliance issues.	Recovery only happens if “significant compliance issues cannot be resolved to the full satisfaction of the Director” and the Director first informs the commission, Board, and grantee. Even then, recovery remedies are at the Director’s discretion.	No
East Multnomah Soil and Water Conservation District (EMSWCD) <i>Cov/Ease Comm. #7</i>	698-015-0140(2): EMSWCD recommends that this language be modified to state that legal access by OWEB, its contractors, and cooperating agencies to a property encumbered by an easement or covenant acquired with OAHF funds be consistent with those access rights granted by the easement to the easement holder.	The purpose of OWEB’s monitoring obligation differs from a grantee’s, in that OWEB monitors to confirm that the grantee is accurately monitoring the investment. Therefore, the type of access and the designees that OWEB might assign might differ from those specified in the grantee’s and landowners’ agreement.	Yes
East Multnomah Soil and Water Conservation District (EMSWCD) <i>Cov/Ease Comm. #8</i>	698-015-0140(2): EMSWCD recommends removing right of access to “cooperating agencies” as a broad allowance, and one that may be unacceptable to prospective easement Grantors.	OWEB will remove “cooperating agencies” from this section.	Yes
East Multnomah Soil and Water Conservation District (EMSWCD) <i>Cov/Ease Comm. #9</i>	698-015-0140(2): EMSWCD recommends deleting “and evaluations” and limiting the ability to enter to the sole purpose of determining compliance.	OWEB will remove “and evaluations” from this section.	Yes
East Multnomah Soil and Water Conservation District (EMSWCD) <i>Cov/Ease Comm. #10</i>	698-015-0160(1): Since a covenant might not have <b>only</b> a negative effect on easement value, EMSWD recommends modifying the text to state that the appraised fair market value of a proposed easement shall account for the impact – if any – of an extant working land conservation covenant.	This provision does not refer to the covenant’s impact on fair market value, but rather to the use of public funds to purchase nearly identical sets of property rights that overlap in time. Therefore, the easement will be reduced by the remaining value of the covenant, regardless of its impact on fair market value.	No
Friends of Family Farmers (FoFF)	698-015-0090: FoFF recommends including in evaluation criteria prioritization for projects that address the unique challenges of affordable access to land for (a) small- and medium-sized family farms and ranches, (b) beginning farmers or ranchers, (c) socially disadvantaged farmers or ranchers, and (d) veteran farmers or ranchers.	As with CMPs, the Commission discussed this point extensively, and decided that the program should focus more on the land than the type of owners and operators. However, an application might point to such factors to demonstrate evaluation criterion #4	No, for this section of the rules.

		(agricultural outcomes). The Technical Assistance Grant Program evaluation criteria (OAR 698-020-0060(3)) have been revised to consider these constituencies.	
McKenzie River Trust (MRT) <i>Cov/Ease Comm. #1</i>	MRT recommends that the rule give guidance for OWEB staff on how to address conflicts between agricultural values (e.g. 698-015-0090(2)) and habitat values (e.g. 698-015-0090(3)) by prioritizing working land values over habitat values. Without such a priority, easement holders could be forced to require landowners to discontinue an agricultural practice that was permissible in an easement funded by OAHP, but which is later found to not maintain the baseline habitat or water quality values. Specifying a priority could allow flexibility for producers due to climate change, changing agricultural markets, and changes to the land, and make it less difficult to find agricultural landowners willing to participate in the program. There are other programs that protect conservation values.	OAHP and the CMP grant program are designed to integrate agricultural and conservation values. To rank high with the review team, a project must demonstrate the maintenance or enhancement of both agriculture and natural resource values.	No
McKenzie River Trust (MRT) <i>Cov/Ease Comm. #2</i>	698-015-0060 and 0070: MRT appreciates the inclusion of a stewardship endowment in regards to its allowance as match and an allowed cost, but recommends the term “long term stewardship funds,” instead of “endowment,” as endowment has specific accounting definitions.	OWEB will change “stewardship endowment” to “stewardship funds”	Yes
McKenzie River Trust (MRT) <i>Cov/Ease Comm. #3</i>	698-015-0060(3): MRT recommends removing the cap on funds contributed to a stewardship endowment to 5% of the total appraised value of the easement, and recommends negotiating the contribution to stewardship endowment as part of each grant award process. Estimates that agricultural easement values will likely be low (due to land use) and the stewardship costs high compared to a habitat easement, depending on the management plan.	OWEB agrees that the amount of the fund is absolutely different based on each property. However, the Board needs to set some limit on what the contribution from the fund is. The commission believes that 5% of OAHP funding is reasonable for a stewardship fund.	No
McKenzie River Trust (MRT) <i>Cov/Ease Comm. #4</i>	698-015-0060(1): MRT recommends deleting “as demonstrated by a formal application or agreement,” since NRCS ACEP conservation easements which call for secured match before they can be applied for.	OWEB will delete “as demonstrated by a formal application or agreement.”	Yes
McKenzie River Trust (MRT) <i>Cov/Ease Comm. #5</i>	698-015-0090: MRT states that the evaluation criteria is vague and it is difficult to have meaningful comments without understanding how the words “significant,” “important,” and “viability” will be assessed.	Given the diversity of Oregon agriculture, it is preferable to allow the applicant to make the case that a particular project is “significant,” which will be assessed by the review team, OWEB staff, commission, and OWEB Board.	No
Myron, Jim	Mr. Myron recommends that establishing riparian buffers where no agricultural activities would occur be a requirement of every easement and covenant funded through the OAHP.	If there is a stream in the project area, the covenant or easement application shall describe how either the easement or the management plan and associated monitoring addresses the local Ag Water Quality	Yes

		Management Area Plan goals. Easement monitoring shall include any riparian monitoring identified in the application.	
National Young Farmers Coalition (NYFC) <i>Cov/Ease Comm. #1</i>	NYFC recommends prioritizing funding for projects that encourage protected farmland to remain affordable and in the hands of farmers.	Applicants may describe the agricultural benefits for affordability and access in their narrative description for evaluation criteria 2 or 4.	No
National Young Farmers Coalition (NYFC) <i>Cov/Ease Comm. #2</i>	NYFC supports 75% program match for project costs with in-kind matching funds allowed for 100% of the landowner contribution	Thank you for your comment.	N/A
National Young Farmers Coalition (NYFC) <i>Cov/Ease Comm.#3</i>	NYFC supports 698-015-0010(2) “providing for the opportunity for continued use of the land for agricultural purposes,” in the program purpose and 698-015-0090(2)(d) “Improving or maintaining the economic viability of the operation, including future transfer of ownership,” in the evaluation criteria	Thank you for your comment.	N/A
National Young Farmers Coalition (NYFC) <i>Cov/Ease Comm. #4</i>	<p>698-015-0090: NYFC recommends that OAHP encourage applicants to utilize innovative strategies to promote farmer ownership and affordability of farmland. Specifically, NYFC recommends that:</p> <ul style="list-style-type: none"> <li>the ranking criteria prioritize farmer ownership and affordability tools in easements/covenants funded by the program, including the Option to Purchase at Agricultural Value (OPAV) easement provision.</li> <li>OAHP allows covenant/easement applicants to apply for funds to place a covenant or easement on property that they own while they are in the process of identifying, and transferring ownership to, a farmer (a.k.a. buy-protect-sell).</li> <li>Easement holders be given the flexibility – and encouraged – to write easements that do not consider ground leases to be an impermissible subdivision of land. Ground leases are land affordability tools that split ownership of the property, so that the organization owns the land and provides a long-term—such as 99-year—lease to the farmer, while the farmer owns the infrastructure.</li> <li>The program give weight to projects that utilize easement funds to facilitate the transition of the farm from one generation to the next and provide access to a young or beginning farmer.</li> </ul>	<p>As stated above, applicants may refer to affordability in criterion 2 or 4.</p> <p>It will be made clear in guidance that the rules do not prohibit “buy-protect-sell” arrangements.</p> <p>Permission to use ground leases will be included in guidance and grant agreement.</p> <p>As with affordability, applicants may refer to the project’s effect on intergenerational transition in criterion 2 or 4.</p>	<p>No</p> <p>No</p> <p>No</p> <p>No</p>
Oregon Department of Fish & Wildlife (ODFW) <i>Cov/Ease Comm.# 1</i>	698-015-0090: ODFW believes that the capability and capacity evaluation criteria are robust and well thought out. The Department appreciates the consideration of supporting implementation of the Oregon Conservation Strategy, including a specific reference to connectivity of wildlife habitat, in the evaluation criteria.	Thank you for your comment.	N/A



Oregon Department of Fish & Wildlife (ODFW) <i>Cov/Ease Comm.#2</i>	698-015-0020(1): ODFW recommends that the rules clarify the entities that may develop a “management plan.”	The definition for conservation management plan was moved to the Administrative rules. All eligible CMP holders are listed in 698-010-0030.	Yes
Oregon Department of Fish & Wildlife (ODFW) <i>Cov/Ease Comm.#3</i>	698-015-0020(3): ODFW recommends that the rules clarify “stewardship endowment” and/or clarify in a separate section of the rule the applicable standards for an endowment. This may include details on calculating the initial funding, maximums per acre and other limitations for the landowner, such as using the funds for payment of taxes. Does this include the opportunity for these funds are set up as an endowment that provides interest funds yearly for operations and maintenance costs? How will the stewardship endowments be tracked or monitored by the program? Will there be an annual stewardship report to the program on spending and investment performance?	OWEB will change the term “stewardship endowment” to “stewardship fund.”  Calculation, etc. of a stewardship fund can be included in guidance, the grant agreement, or a link to best practices/ accreditation.	Yes
Oregon Department of Fish & Wildlife (ODFW) <i>Cov/Ease Comm. 4</i>	698-015-0080: ODFW recommends that the rules include terms and expectations for easements (as well as covenants), i.e. permanent per the definition.	OWEB will change the title of 0080 to “Terms of Covenants and Easements” and specify that easements are permanent.	Yes
Oregon Department of Fish & Wildlife (ODFW) <i>Cov/Ease Comm. #5</i>	698-015-0140(2): ODFW recommends that the rules clarify if third party right of enforcement can be assigned.	After consulting with DoJ, OWEB can assign third party rights of enforcement if such language is included in the easement document, which is currently standard practice for OWEB’s land acquisition program.	No
Oregon Department of Fish & Wildlife (ODFW) <i>Cov/Ease Comm.#6</i>	ODFW prefers easements over covenants because of their permanence. This could be accomplished during the application reviews, such as the establishment of a point system where covenants would be ranked significantly lower than projects with permanent easements.	698-015-0090(6)(b) provides ranking criterion that “The duration and extent of the agreement, with a preference for longer term agreements”	No
Oregon Department of Fish & Wildlife (ODFW) <i>Cov/Ease Comm.#7</i>	ODFW recommends clarification in how a covenant would be appraised for payment.	The commission is currently valuation methods for covenants, which will be included in rule when finalized.	For future consideration
Restore Oregon’s Heritage Barns Task Force <i>Cov/Ease Comm.#1</i>	698-015-0090: Restore Oregon recommends that the rules include language that specifically calls for the preservation of historic buildings, structures, or objects associated within the agricultural fabric of the lands under review. Specifically, Restore Oregon recommends that the rules encouraging the maintenance and use of historic barns as agricultural buildings and/or their adaptive reuse when their historic use is no longer viable.	OWEB will include this in program guidance.	No

Restore Oregon's Heritage Barns Task Force <i>Cov/Ease Comm.#2</i>	Restore Oregon recommends that the rules encourage the application for conservation easements on lands with historic agricultural buildings or structures as a tool in holistic succession planning.	OWEB will include this in program guidance.	No
Restore Oregon's Heritage Barns Task Force <i>Cov/Ease Comm.#3</i>	698-015-0090(4)(b): Restore Oregon recommends that the presence of a historic barn on the property represent one way of demonstrating the regional significance of the agricultural operation's associated infrastructure.	OWEB will include this in program guidance.	No
Southern Oregon Land Conservancy (SOLC) <i>Cov/Ease Comm.#1</i>	698-010-0010: SOLC recommends that the purpose language be consistent with other rules re: fish and wildlife, and agriculture practices.	OWEB will work to create consistency in purposes and definitions.	Yes
Southern Oregon Land Conservancy (SOLC) <i>Cov/Ease Comm.#2</i>	698-015-0060: SOLC recommends removing the requirement to have match already approved because this makes it difficult to rely on another grant program – NRCS – as a match because of timing of grants and each requiring secured funds; they have to work together	OWEB will delete "as demonstrated by a formal application or agreement."	Yes
Southern Oregon Land Conservancy (SOLC) <i>Cov/Ease Comm.#3</i>	698-015-0060: SOLC recommends that the commission remove the 5% of appraisal cap for stewardship funds. This is arbitrary and may not reflect real stewardship needs.	OWEB agrees that the amount of the fund is absolutely different based on each property. However, the Board needs to set some limit on what the contribution from the fund is. The commission believes that 5% of OAHP funding is reasonable for a stewardship fund.	No
Southern Oregon Land Conservancy (SOLC) <i>Cov/Ease Comm.#4</i>	698-015-0070: SOLC expresses strong support for funds for interest on loans and for stewardship.	Thank you for your comment.	N/A
Southern Oregon Land Conservancy (SOLC) <i>Cov/Ease Comm.#5</i>	698-015-0090: SOLC recommends that the rules clarify "regionally significant" language. Concern that it appears to favor large-scale operations over smaller farms, without good rationale.	Given the diversity of Oregon agriculture, it is preferable to allow the applicant to make the case that a particular project is "significant," which will be assessed by the review team, OWEB staff, commission, and OWEB Board. These words will be clarified in guidance.	No
Southern Oregon Land Conservancy (SOLC) <i>Cov/Ease Comm.# 6</i>	698-015-0090: SOLC notes that there is no criterion to evaluate the type of agriculture, which have differing impacts and economies: e.g., grazing, versus food crops for local markets.	Given the diversity of Oregon agriculture, ORS 541.984(4) prohibits considering the type of agricultural production on the working land.	No
Southern Oregon Land Conservancy (SOLC) <i>Cov/Ease Comm.#7</i>	698-015-0090(5)(b): SOLC states that while Land Trust Accreditation is probably a good thing overall, there is a concern for requiring costly participation in a private organization so the option to demonstrate sufficient practices is a good and necessary option.	Thank you for your comment.	N/A

Southern Oregon Land Conservancy (SOLC) <i>Cov/Ease Comm.#8</i>	698-015-0090(5)(b): SOLC states that it cannot understand why "working land preservation" has to be in a mission statement (I imagine land trusts might be tempted to change their missions statements as a result). The language here seems to be flexible enough though.	This ranking criterion (and all others under 0090) are not required, but are rather the set of factors considered by the review team, OWEB staff, commission and board in conducting ranking. An applicant with "working land preservation" in its mission statement may rank higher, but the ranking process is holistic in considering all criteria.	No
Southern Oregon Land Conservancy (SOLC) <i>Cov/Ease Comm.#9</i>	698-015-0090 (8): SOLC states that, in some cases, it is difficult to demonstrate threat of fragmentation with certainty especially with larger properties (e.g., ranches).	Given the diversity of Oregon agriculture, each applicant can make a case for the threat of fragmentation and conversion for the parcel at hand. Guidance will advise how to demonstrate this.	No
Southern Oregon Land Conservancy (SOLC) <i>Cov/Ease Comm.#10</i>	698-015-0160: SOLC recommends limiting the time period between when a covenant and subsequent easement are conveyed to avoid intentional working of the funding system to one's advantage.	An easement may be conveyed after a covenant for many reasons, including new ownership.	No
WaterWatch	698-015-0120: WaterWatch recommends adding more specificity to the public involvement section of the rules, including: <ul style="list-style-type: none"> <li>• opportunity to comment on applications (1) before the technical team review, and (2) to the Commission based on the technical team recommendations to the Commission.</li> <li>• Each review period should be a minimum of thirty days.</li> <li>• Applications and review team recommendations should be posted on OWEB's website and notice should be send to OWEB's mail serve list, as well on the OWEB website.</li> </ul>	The public involvement process is described in ORS 271.735. Additional procedures may be added in guidance.	No
Yamhill Soil and Water Conservation District	The district suggests terms of covenants be no less than 30 years, nor longer the 100 years, instead of 20 years and 50 years, respectively. As stated previously, permanent easements should be prioritized over covenants.	The statute prescribes that covenants shall have terms between 20 and 50 years [ORS 541.989 (1)(b)].	No
Oregon Farm Bureau and Oregon Cattlemen's Association <i>Cov/Ease Comm. #1</i>	Purpose of Covenants and Easements (OAR 698-015-0010(2)): We prefer the original language of this section, which provides for "ensuring" the continued use of the land for agricultural purposes. We think that the mandate of this program – particularly at the application stage – is greater than to simply ensure land is available for agriculture. Land should be actively used in farming or ranching when enrolled in the program or have a definite plan to return the land to farm or ranch use. While we agree that no one can mandate that the land remain in production, without interruption, in perpetuity, we think that a purpose of the covenant or easement should be ensuring the continued use of the land for agriculture production.	The purpose has been changed to "preserve and protect the continued use of a working land for agricultural purposes..." consistent with proposed changes to the enabling statute.	Yes

Oregon Farm Bureau and Oregon Cattlemen's Association <i>Cov/Ease Comm. #2</i>	Definitions (OAR 698-015-0020(1)): The final sentence is a little difficult to read. We recommend rewording it to "If applicable, it may also address any proposed agricultural projects..." We recommend leaving out the reference to public access, as that is not a purpose of this program.	This subsection was moved to Division 005 Program Administration since it may apply to both CMP and easement/covenant projects. The reference to public access was deleted.	Yes
Oregon Farm Bureau and Oregon Cattlemen's Association <i>Cov/Ease Comm. #3</i>	CMPs vs. Management Plans (OAR 685-015-0050): While we understand that they are separate plans, we think it would be useful if the rules clarified the difference between a Conservation Management Plan and a management plan for easements and covenants. We recommend that the rules either come up with a different term for "management plan" or always capitalize "Conservation Management Plan" to reduce the potential for confusion between the two.	Created a separate definition for "management plan" and moved both definitions to the administrative rules (division 005).	Yes
Oregon Farm Bureau and Oregon Cattlemen's Association <i>Cov/Ease Comm.#4</i>	Stewardship Endowment (OAR 698-015-0060(3)): We are not clear what a stewardship endowment fund is as outlined in the rules, and believe the term could use additional clarification.	A definition of "stewardship" was added and the definition of "stewardship fund" was revised.	Yes
Oregon Farm Bureau and Oregon Cattlemen's Association <i>Cov/Ease Comm.#5</i>	Evaluation Criteria (OAR 698-015-0090): We appreciate the thought that went into the evaluation criteria for the statutory factors. a. For both the agricultural and conservation factors, we note that an "or" is more appropriate in the list than an "and" because all factors may not present for all applications, and all factors should not be required to fund a project. b. On comment NM7, we recommend adding infrastructure to the comments. c. On comment NM12, water quality goals should be driven by the local area plans, which is the plan for achieving any applicable TMDL. d. On comment NM17, we recommend adding "economic value/contribution to the local economy." e. For 6(c), we recommend changing "including OAHF" to "including other OAHF funded plans, covenants or easements"	a. The evaluation criteria are based on the "extent to which" the project addresses the agricultural and conservation factors, and does not require a project to address all of them. b. We will add infrastructure to the list of topics addressing agricultural viability. c. Agreed. Guidance on water quality will reference local area plans as the plan for achieving any applicable TMDL.. d. Guidance on regional significance will include economic value/contribution to the local economy. e. Agreed.	a-no b-yes c-yes d-no e-yes
Oregon Farm Bureau and Oregon Cattlemen's Association <i>Cov/Ease Comm. #6</i>	Payment Relationship (OAR 698-015-0170(1)): The last word in this sentence should be "covenant" and not "easement".	Agreed	Yes
Oregon Board of Agriculture <i>Cov/Ease Comm. #1</i>	OAR 698-015-0090(2)(a) Evaluation criteria for working lands easements and covenants. Similar to previous comments, use of the term "fragmentation" as currently defined or without the addition of consideration of other types of land conversion. See items #4 and #6 above.	The definition of "conversion" was expanded and the term "conversion" combined with "fragmentation throughout the draft rules.	Yes
Oregon Board of Agriculture	OAR 698-015-0090(3) Working lands and conservation management plans. It appears that this criterion limits the consideration of working lands to	Definitional changes address this issue.	Yes

<i>Cov/Ease Comm. #2</i>	those that also have “conservation management” issues. We are concerned that important working lands under the threat of conversion to nonfarm development with no conservation management issues will not be given consideration for needed protection.		
Oregon Board of Agriculture <i>Cov/Ease Comm. #3</i>	OAR 698-015-0090(4) Over all, this section does a great job considering the assets needed to maintain viable farm use in a given region. OAR 698-015-0090(4)(b) Assesses the “regional significance” of an “agricultural operation.” This could be a very narrow consideration without better defining “operation.” Agricultural operations and practices can and do change. The suitability of land to be used for a “significant operation” is just as, if not more important than what is the current operation character. Lands that are currently “under-utilized” yet are capable of high value production based on capability and suitability should be given strong consideration as viable agricultural land.	This was expanded to include suitability of soils, slope, location or other relevant factors.	Yes

**Rules: Technical Assistance Rules (OAR 698-020)**

Commenter(s)	Comments	Staff Recommendation	
		Response	Rule Change
Friends of Family Farmers	698-020-0060: FoFF recommends the commission define the term “underserved populations” to include (a) small- and medium-sized family farms and ranches, (b) socially disadvantaged farmers or ranchers, and (c) veteran farmers or ranchers using the definitions recommended above, in addition to ‘beginning or young farmers and ranchers’	OWEB recommends including as criteria and matching the USDA the definitions of “underserved populations” to include “socially disadvantaged farmers or ranchers,” “veteran farmers or ranchers,” and “limited resource farmer or rancher” and using the USDA definitions for these terms.	Yes
Oregon Farm Bureau and Oregon Cattlemen’s Association	Evaluation Criteria (OAR 698-020-0070): We agree with the recommendation to change the criteria around unserved populations to reference beginning farmers and ranchers.	Agreed.	Yes

**Rules: Succession Planning Rules (OAR 698-025)**

Commenter(s)	Comments	Staff Recommendation	
		Response	Rule Change
None.			



# Oregon

Kate Brown, Governor

## Oregon Watershed Enhancement Board

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*Agenda Item I supports OWEB's Strategic Plan priority # 5: The value of working lands is fully integrated into watershed health.*



## MEMORANDUM

**TO:** Oregon Watershed Enhancement Board  
**FROM:** Meta Loftsgaarden, Executive Director  
Eric Williams, Grant Program Manager  
**SUBJECT:** Agenda Item I-2 – Oregon Agricultural Heritage Commission Appointments  
January 15-16, 2019 Board Meeting

### I. Introduction

The Oregon Agricultural Heritage Commission (OAHC) was established by law in 2017 to provide voluntary tools to protect and enhance working lands while maintaining or enhancing valuable fish and wildlife habitat and other natural resource values. By statute, the OAHC is nested under the Oregon Watershed Enhancement Board. The board is tasked with appointing commissioners. This item requests board approval to reappoint two commissioners to the OAHC.

### II. Background

The OAHC was appointed by the board on January 31, 2018, with four-year terms that were initially staggered from one to four years. Two initial one-year appointments expire at the end of January: one recommended by the Board of Agriculture and one recommended by the Fish and Wildlife Commission. Both of these boards/commissions have recommended reappointing their representative commissioners: Ken Bailey, representing the Board of Agriculture, and Mary Wahl, representing the Fish and Wildlife Commission.

### III. Recommendation

Staff recommend the board reappoint Ken Bailey and Mary Wahl to the Oregon Agricultural Heritage Commission for four-year terms.



# Oregon

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



## MEMORANDUM

**TO:** Oregon Watershed Enhancement Board  
**FROM:** Courtney Shaff, Capacity Programs Coordinator  
**SUBJECT:** Agenda Item J– Development FIP Grant Awards  
January 15-16, 2019 Board Meeting

### I. Introduction

This staff report provides an overview of the 2018 Development Focused Investment Partnership (FIP) grant offering, and provides staff recommendations for grant awards.

### II. Background

At the July 2017 meeting, the board adopted its 2017-2019 spending plan and allocated \$1 million for Development FIP grants. The funding supports existing partnerships to build their capacity to partner at a high-performing level, generate a new strategic action plan (SAP), enhance an existing SAP, and/or develop a financial plan. In October 2017, the board awarded four Development FIP grants, and included funding for partnerships to develop financial plans as a part of their Development FIP proposals.

### III. Solicitation Process and Review

In May 2018, staff solicited for a second round of 2017-2019 Development FIP applications. Prior to submitting a proposal, applicants were required to consult with FIP staff and the Capacity Programs Coordinator to better understand the program's purpose, allowable activities, evaluation criteria, and timing. Five consultations with potential applicants were held between May and October 2018.

Four applications were received by the October 22, 2018 deadline. Applications were evaluated based on the evaluation criteria included in the FIP rules, 1) capacity to partner, 2) performance history and composition of the partnership, 3) catalyze additional investments, 4) engage the community, and 5) extent to which the initiative addresses the board priority. Reviewers provided a 'fund' or 'do not fund' recommendation, and ranked applications. Based on the reviews, staff recommend three projects for funding.

### IV. Recommendation

Staff recommend the board award Development FIP grants as described in Attachment B.

### Attachments

- A. Map of Development FIP applications
- B. Staff Funding Recommendations
- C. Evaluations



# 2018 Development FIP Applications



**Salmon SuperHwy**  
219-8302-16574

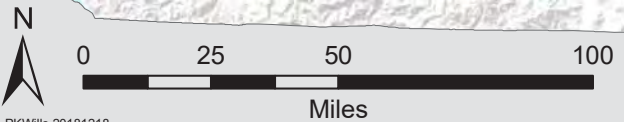
**Intertwine All Oak  
Prairie Working Group**  
219-8301-16572

**Sandy River  
Basin  
Partners**  
219-8304-16576

**Pure Water  
Partnership**  
219-8303-16575

**Application Funding Status**

- Fund
- Do Not Fund





**Staff Funding Recommendation  
2017 Capacity Building FIP Applications**

Project Number	Applicant	Project Title	OWEB Request	Amount Recommended	Brief Description
219-8301-16572	Urban Greenspaces Institute	The Intertwine Alliance Oak Prairie Working Group	\$69,000	\$69,300	The Intertwine Alliance Oak Prairie Working Group is a 30+ member conservation partnership in the Portland-Vancouver metropolitan region, which has recently completed a strategic action plan. The goal of this proposal is to incorporate an 'open standards' approach in to the strategic action plan, engage new partners, build capacity with new and existing partners, and formalize our governance structure.
219-8302-16574	Trout Unlimited	SalmonSuperHwy	\$90,750	\$90,750	The Salmon SuperHwy partnership is working to restore connectivity to 180 miles of historically available habitat for Coho, Chinook, Chum, Steelhead, Cutthroat Trout, and Pacific Lamprey. The partnership will update an existing strategic plan, enhance partnership performance, and develop a financial plan.
219-8303-16575	Cascade Pacific RC&D	Pure Water Partners	\$136,224	\$136,224	The Pure Waters Partners program is a locally-developed effort designed to engage private landowners in the McKenzie River Sub-basin in long-term watershed restoration and conservation projects. The proposed project seeks to elevate the partnership's current level of performance through the development of planning documents that will create a programmatic approach to outreach, assessment, project development, and fundraising that protects and enhances habitat for native species and water quality at a landscape scale.
219-8304-16576	Sandy River WC	Sandy River Basin Partners	\$147,378	\$0	The Sandy Basin Partners will enhance an existing strategic action plan by evaluating reach targets utilizing current habitat conditions. The Partners will update the model to refine targets, track progress towards meeting objectives, and have a better understanding of where the next 10 years of habitat restoration can take place.
<b>Total capacity Building FIP Request</b>			<b>\$443,352</b>		
<b>Total Recommended for funding by OWEB Staff</b>				<b>\$296,274</b>	

# Development FIP Application Evaluation

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## OVERVIEW

**Project #:** 219-8301-16572

**OWEB Region:** 3

**Partnership Name:** The Intertwine Alliance Oak Prairie Working Group

**Requested Amount:** \$69,300.00

**Board Priority Addressed:** Oak Woodland and Prairie Habitat

### Intent of Capacity-Building Funding:

- Elevate the partnership's current level of performance
- Enhance an existing strategic action plan

### Applicant's Summary:

The Intertwine Alliance Oak Prairie Working Group (OPWG) is a 30+ member conservation partnership in the Portland-Vancouver metropolitan region, which has recently completed a strategic action plan. With this proposal, the OPWG is seeking OWEB support to augment our strategic plan, incorporate an 'open standards' approach, engage new partners, build capacity with new and existing partners, and formalize our governance structure. Core OPWG partners involved include: Portland Parks & Recreation, Tualatin Hills Parks and Recreation, Clackamas and Tualatin Soil and Water Conservation Districts, U.S. Fish and Wildlife Service, Metro Regional Government, and the Urban Greenspaces Institute. We envision the following social and ecological outcomes:

- High-value representative native oak and prairie habitats are permanently safeguarded within the region;
- The general public values and helps steward these imperiled habitats across a mix of public and private lands both within urban and rural settings;
- Public and private landowners with oak and prairie habitats value these remarkable habitats and are appreciated, recognized, and supported by the community-at-large for their stewardship and conservation;
- There is active human management of native oak and prairie habitats to promote ecosystem resiliency, protect dependent at-risk species, and celebrate indigenous cultural legacy lifeways that gave rise to them.

## REVIEW SUMMARY

### Application strengths identified during review include:

- The challenges of the partnership are clearly articulated and the proposed solutions clearly tie back to the challenges.
- The need for an updated strategic action plan is clearly articulated.
- There is excellent match from a variety of partners.
- This is an inclusive and active partnership.

- This is a complex landscape. The partnership has clearly articulated the need to engage the community and has the right people in place to deal with those complexities.
- The partnership has clearly described the need to increase tribal engagement.

**Application concerns identified during review include:**

- This is a large partnership, over 30 partners; a strong facilitator will be needed to keep the group on track.
- While the partnership described the need, they need to clearly articulate their approach towards tribal engagement. This will be important to successfully engage tribal partners.
- It is unclear how this work interacts with the work of the Oak Accord in the Willamette Valley.
- OSU Extension and Oregon Small Woodlands Association seem to be missing as partners.

**Concluding Analysis:**

This is a large, active partnership, with the right groups at the table to be successful. The partnership clearly understands their challenges and the need for an updated strategic action plan. The partnership is actively engaged with OWEB's three other Oak Woodland Development FIPs, which enables peer-to-peer learning and cross-pollination of ideas.

**Review Team Priority Ranking:** 2 of 3

**Review Team Recommendation:** Fund

**Staff Recommendation:** Fund

**Amount:** \$69,300.00

# Development FIP Application Evaluation

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## OVERVIEW

**Project #:** 219-8302-16574

**OWEB Region:** 1

**Partnership Name:** Salmon SuperHwy

**Requested Amount:** \$90,750.00

**Board Priority Addressed:** Aquatic Habitat for Native Fish Species and Coho Habitat and Populations along the Oregon Coast

### Intent of Capacity-Building Funding:

- Elevate the partnership's current level of performance
- Enhance an existing strategic action plan
- Develop a financial plan

### Applicant's Summary:

The intended ecological outcome of the Salmon SuperHwy is to restore connectivity to 180 miles of historically available habitat for Coho, Chinook, Chum, Steelhead, Cutthroat Trout, and Pacific Lamprey. The partners recognize that addressing connectivity is a high priority, cost-effective approach to protecting and restoring anadromous fish populations. Improving connectivity can increase habitat diversity and population resilience and thus compensate for the effects of climate change induced stream flow reductions, temperature increases, and extreme storm events. Restoring connectivity allows for natural stream processes like transport of sediment, debris, and nutrients, normalized flow and temperature regimes, and reduced catastrophic culvert failures that increase sedimentation and are a threat to both aquatic organisms and public safety.

Salmon SuperHwy core partners include: Tillamook Estuaries Partnership, Tillamook Bay Watershed Council, Nestucca-Neskowin Sand Lake Watersheds Council, Tillamook County Public Works, Oregon Department of Fish and Wildlife, Oregon Department of Forestry, Oregon Fish Passage Task Force, Bureau of Land Management, USDA Natural Resources Conservation Service, US Fish and Wildlife Service, US Forest Service, and Trout Unlimited.

## REVIEW SUMMARY

### Application strengths identified during review include:

- The partnership has an existing charter that was developed in 2015. The partnership plans to update the charter to address their evolving needs and challenges.
- The application clearly describes the partnership's challenges and the proposed actions directly address those challenges.
- The application clearly describes the need to engage with working lands landowners.

- Partners demonstrate the need and desire to work together and the application demonstrates a strong commitment. This proposal will help the partners build off the initial commitment and develop clear roles and responsibilities.
- The application has good match from the USFWS and there is a desire among the partners to diversify funding sources through the development of a financial plan.

**Application concerns identified during review include:**

- The proposal covers a large geography, but the restoration focus is very narrow (fish passage). It is unclear what the broader ecological objectives are of the partnership.
- The application does not articulate the broader value of participating in the partnership beyond pursuing fish barrier removal.
- The application clearly describes the need to access private lands, but it does not clearly describe why this has been a challenge or provide detail about how the partnership would address this challenge.
- The application does not clearly describe the role of NRCS, which seems critical in this rural, agricultural landscape.
- There has recently been significant turnover among organizations located in the North Coast. It is unclear from the application as to whether there is enough capacity in the core partners remaining to carry the workload for this proposal.
- A stronger emphasis on outreach and communication would likely benefit the partnership.

**Concluding Analysis:**

The partnership has a history of successfully working together with a very specific focus on fish passage. As the partnership works to update its charter and strategic action plan, they should think about developing a larger vision for the partnership and developing clearly ecological outcomes for the geography. The application lays out several components, which are critical to success, including the charter update, outreach plan, financial plan, and updated strategic action plan. It is unlikely the partnership will find one contractor that can successfully assist with all these needs. The partnership should consider hiring separate contractors to help with different aspects of the project.

**Review Team Priority Ranking:** 3 of 3

**Review Team Recommendation:** Fund

**Staff Recommendation:** Fund

**Amount:** \$90,750.00

# Development FIP Application Evaluation

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## OVERVIEW

**Project #:** 219-8303-16575

**OWEB Region:** 3

**Partnership Name:** Pure Water Partners

**Requested Amount:** \$136,224.00

**Board Priority Addressed:** Aquatic Habitat for Native Fish Species

### Intent of Capacity-Building Funding:

- Elevate the partnership's current level of performance
- Develop a financial plan

### Applicant's Summary:

The Pure Waters Partners (PWP) program is a locally-developed effort designed to engage private landowners in the McKenzie River Sub-basin in long-term watershed restoration and conservation projects. The intended ecological outcomes of the project are enhanced habitat for native fish and other key species, and maintenance and improvement of high-quality drinking water for local residents, and downstream water users. PWP partners successfully completed a Pilot Project in 2017 with 15 private landowners and are currently engaged with initial outreach to priority landowners. Partner organizations include Cascade Pacific Resource Conservation and Development (CPRCD), Eugene Water & Electric Board (EWEB), McKenzie River Trust (MRT), McKenzie Watershed Council (MWC), Eugene-Springfield Metropolitan Wastewater Management Commission (MWMC), Upper Willamette Soil and Water Conservation District (UWSWCD), University of Oregon (UO), and U.S. Forest Service (USFS). The proposed PWP Partnership Development Project (Project) seeks to elevate the partnership's current level of performance through the development of planning documents that will create a programmatic approach to outreach, assessment, project development, and fundraising that protects and enhances habitat for native species and water quality at a landscape scale.

## REVIEW SUMMARY

### Application strengths identified during review include:

- Although the application proposes to pursue partnership enhancement and the development of a financial plan, the activities involved are not typical of a Development FIP application; however, it demonstrates that the partnership knows what they need to do and are ready to do it.
- The partnership has many guiding plans already in place, but the work proposed in this application will pull everything together in a strategic, geographic approach.
- The partners clearly understand the challenges and the proposed actions directly address those challenges.
- The Watershed Conservation Fund is a very interesting model, and the partners clearly already have an agreement in place for sharing funding.

- The community engagement aspects of the proposal are well described.
- The budget includes excellent detail.
- The partnership has a strong adaptive management structure.

**Application concerns identified during review include:**

- Fish aspect is a secondary benefit to the drinking water source benefit; however both are important and clearly benefit the other.
- The partnership will likely need two facilitators to assist with the different and diverse aspects of the project.
- The project timeline is very ambitious, it is unclear from the proposal if all of the project components listed in the application as complete in January are already in motion or will begin after funding is awarded. The partners might need to adjust the timeline.

**Concluding Analysis:**

The partnership has a history of successfully working together and actively practicing adaptive management over the history of the partnership. This proposal builds off the partnerships past successes and supports their growth as they continue to evolve and explore expanding into a new geography. The partnership should consider hiring separate contractors to help with different aspects of the project.

**Review Team Priority Ranking:** 1 of 3

**Review Team Recommendation:** Fund

**Staff Recommendation:** Fund

**Amount:** \$136,224.00

# Development FIP Application Evaluation

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## OVERVIEW

**Project #:** 219-8304-16576

**OWEB Region:** 3

**Partnership Name:** Sandy River Basin Partners

**Requested Amount:** \$147,378.00

**Board Priority Addressed:** Aquatic Habitat for Native Fish Species

### Intent of Capacity-Building Funding:

- Elevate the partnership's current level of performance
- Enhance an existing strategic action plan

### Applicant's Summary:

The Sandy River Basin Partners include the Sandy River Watershed Council, Metro, East Multnomah Soil and Water Conservation District, the Portland Water Bureau, the Bureau of Land Management, USDA Forest Service, Oregon Department of Fish and Wildlife, The Freshwater Trust, and the Sandy Chapter of the Northwest Steelheaders. Each partner, both individually and collaboratively, have had extensive experience planning and completing restoration activities improving the Sandy populations of listed salmon and steelhead. Ecological outcomes identified by the partnership will address limiting factors of degraded water quality, aquatic and riparian habitat, migratory corridor connectivity and fish passage, and invasive species in priority areas presenting habitat for all life stages of salmonids in the Sandy River basin. The Sandy Basin Partners will enhance an existing strategic action plan by evaluating reach targets utilizing current habitat conditions. Restoration strategy objectives are derived from the EDT model that compares historic vs. current conditions for metrics limiting salmon and steelhead populations. The Partners will update the model to refine targets, track progress towards meeting objectives, and have a better understanding of where the next 10 years of habitat restoration can take place.

## REVIEW SUMMARY

### Application strengths identified during review include:

- The partnership has a history of working together and has completed important restoration work in the basin.
- The proposal focuses on important fish habitat.
- This project occurs in a relatively urban area with good visibility, which could lead to opportunities to tell the restoration story.
- The partnership has a facilitator for the Ecosystem Diagnosis and Treatment process.

### Application concerns identified during review include:

- The partnership challenges were not clearly described in the application.



- The proposed solutions did not clearly connect to the challenges described in the application. The partnership, as described in the application, seems to rely heavily on watershed council staff, the roles and responsibilities of other partners were not clearly described.
- The idea behind updating the EDT was not clearly described, it was unclear how the update would occur and how the resulting information would be used.
- The narrative of the application and budget were not well tied together, it is unclear what specific tasks the watershed council executive director and development director will be doing over the course of the project.
- It is unclear how the communications plan will be used by the partnership to engage the local community.
- The timeline feels very tight and may not be realistic.

**Concluding Analysis:**

The partnership has been working together for a long-time and has a history of successfully implementing complex restoration projects in the Sandy basin. However, the application lacked key details and information needed to effectively evaluate its likelihood for success. The application did not clearly describe how the partnership challenges would be addressed through the actions proposed in the application. More detail was needed on which partners would be doing which activities. The proposed rerunning of the EDT model might be a better fit for an OWEB open solicitation technical assistance grant application.

**Review Team Priority Ranking:** N/A

**Review Team Recommendation:** Do Not Fund

**Staff Recommendation:** Do Not Fund

**Amount:** \$0.00



# Oregon

Kate Brown, Governor

## Oregon Watershed Enhancement Board

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*Agenda Item K 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  
Eric Hartstein, Senior Policy Coordinator  
Andrew Dutterer, Partnerships Coordinator  
**SUBJECT:** Agenda Item K – Implementation FIP Update  
January 15-16, 2019 Board Meeting

### I. Introduction

This report provides an update on the Focused Investment Partnership (FIP) Implementation initiatives that were awarded for the 2017-2019 biennium. Staff will provide summary information, and Implementation FIP partners will provide a progress report to the board and answer questions from board members.

### II. Background

At its January, 2016 meeting the board awarded funding to six partnerships as part of the Implementation FIP program. In the spring of 2016, agreements between each partnership and OWEB were developed which govern the process for technical project reviews, grant awards, and reporting. Those funds supported the partnerships in pursuing their conservation initiatives in the 2015-2017 biennium. A map of the Implementation FIP geographies is provided as Attachment A.

At its July, 2017 meeting the board awarded funding to the six partnerships to continue their initiatives for a second biennium. The following table outlines the amount of funding awarded to each partnership to date:

<b>Partnership</b>	<b>2015-2017 Award Amount</b>	<b>2017-2019 Award Amount</b>	<b>Total Award Amount</b>
The Deschutes Partnership	\$4,000,000	\$4,000,000	\$8,000,000
Willamette Mainstem Anchor Habitat Working Group	\$2,550,000	\$2,445,000	\$4,995,000
Upper Grande Ronde Initiative	\$1,771,610	\$2,416,500	\$4,188,110
Harney Basin Wetlands Initiative	\$1,780,000	\$1,970,000	\$3,750,000
Oregon Model to Protect Sage Grouse, All Counties	\$2,295,938	\$2,355,250	\$4,651,188
Ashland Forest All-lands Restoration	\$1,660,000	\$2,340,000	\$4,000,000
<b>Total</b>	<b>\$14,057,548</b>	<b>\$15,526,750</b>	<b>\$29,584,298</b>

### **III. Implementation**

In order to implement their initiatives, each partnership has submitted project grant proposals to OWEB (i.e., capacity building, outreach, acquisition, technical assistance, monitoring, and restoration). Project proposals are reviewed by technical review teams (TRT) that have been developed with partnership input. The role of the TRT is to: a) verify that proposed projects contribute to the outputs and outcomes described in each partnership's Strategic Action Plan; and, b) to collaborate with OWEB and the partners to ensure that each project is technically sound, including the best possible design and necessary components for successful implementation. Attachment B provides an accounting of each partnership's projects, as well as projects intended to be submitted to OWEB before the end of the 2017-2019 biennium.

Nearing the end of the second biennium of FIP awards (2017-2019), and roughly halfway through each six-year initiative, the partnerships have provided feedback to OWEB on project implementation, adjustments to Strategic Action Plans, successes and challenges encountered, and progress toward desired ecological outcomes. These progress reports are also provided in Attachment B.

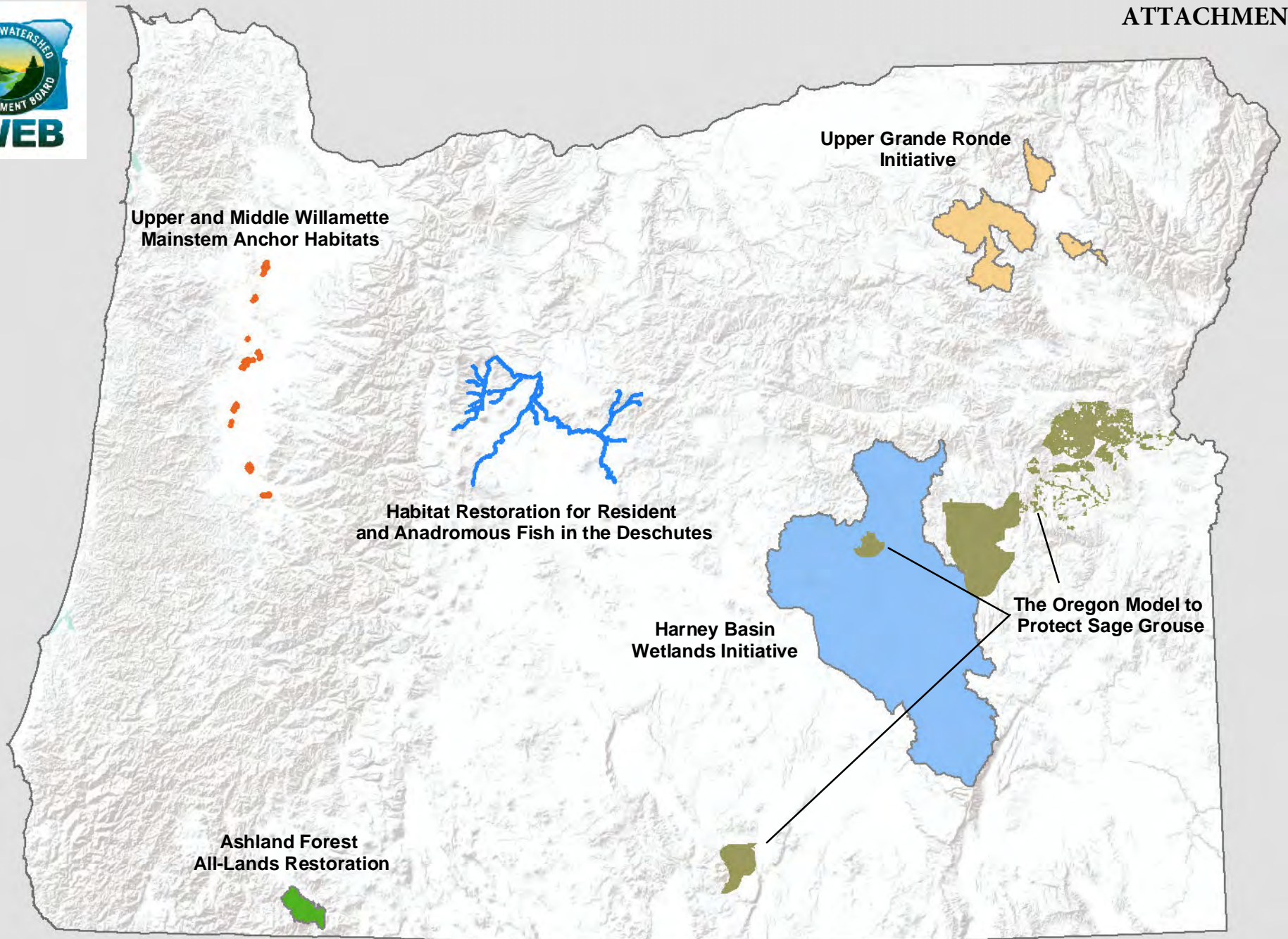
Following January's discussion, at the April board meeting staff will recommend third biennium awards for each of the six partnerships.

#### **IV. Recommendation**

This is an information item only. Implementation FIP partners will be at the January board meeting to update about progress in their initiatives.

#### **Attachments**

- A. Implementation FIP Map
- B. Partnership Progress Reports and Project Accounting





**Focused Investment Partnerships (FIP)  
Biennium 2017-2019**

**Biennial Report – January 2019**

Name of Partnership: Deschutes Partnership

Please address the following questions (*in five pages or fewer*):

- 1) How is your partnership making progress toward achieving its implementation objectives (outputs)? What factors (positive or negative) have impacted your ability to achieve your identified goals?

The Deschutes Partnership (Partnership) has made significant progress toward achieving its implementation outputs throughout the 2017-2019 biennium. Since the beginning of the biennium, we submitted grant applications to OWEB for a combination of project types from across our entire FIP geography (see Table 1.).

	Whychus	Crooked River	Metolius
FIP Partnership Capacity	X	X	X
Land Acquisition	X	X	
Technical Assistance	X	X	
Monitoring	X	X	
Outreach	X	X	X
Restoration	X	X	

Table 1: 2017-2019 Deschutes Partnership FIP grant application types and geography

In total, these projects account for approximately half of our total FIP funding for the 2017-2019 biennium. We are working on developing an additional seven project grant applications that we expect to submit for FIP funding in spring 2019, putting us on track to spend our \$4M FIP allocation for this biennium. Proposed project types will include restoration, technical assistance and outreach.

The biggest factor impacting our ability to achieve the goals we identified in our Strategic Action Plan (SAP) was our ability to leverage opportunities in the Crooked River subbasin over this and the previous biennium, allowing for expedited project implementation in this geography. Last biennium, we were able to fund and begin implementation on the Opal Springs passage project ahead of our SAP timeline, freeing up FIP resources to allow for the purchase of a key piece of floodplain property at the





confluence of Ochoco and McKay Creeks and the Crooked River this biennium. These factors have enabled the Partnership to begin planning for and implementing habitat restoration actions in the Crooked River subbasin now, three years ahead of our SAP schedule. To do so using FIP funding, however, requires an update to our FIP workplan, which does not currently include habitat restoration in the Crooked River subbasin. The Partnership will be presenting a change of scope memo to the OWEB Board at the January 2019 meeting regarding the inclusion of habitat restoration in the Crooked River in the 2019-2021 biennium.

- 2) Describe how on-going and proposed monitoring activities will measure ecological progress? Is the partnership on a trajectory to measure ecological outcomes? What challenges and opportunities do you see in this work?

The Partnership and our restoration partners outside the FIP are implementing monitoring in the Whychus Creek, Metolius and Crooked River watersheds to measure the outcomes of streamflow restoration, stream habitat restoration, and fish passage and irrigation diversion screening projects. Monitoring indicators for each of the four restoration strategies are identified in the Partnership's 2015-2021 Focused Investment Program Progress Monitoring Plan (Deschutes Partnership, 2018). Indicators were identified in response to hypotheses about the ecological outcomes of each restoration action and include physical and biological parameters. Status and trends observed for each indicator are providing information about how, and how much, these indicators are changing following restoration. This information allows the Partnership to describe and quantify the ecological conditions observed following restoration work as a measure of ecological outcomes. We anticipate ongoing monitoring of these indicators by the Partnership, including baseline and post-project data collection, will allow us to measure the ecological outcomes of restoration. Of particular note is the baseline monitoring effort the Partnership will implement in the Crooked River subbasin (lower Crooked River and McKay Creek) ahead of restoration actions we anticipate implementing next biennium with the change in the scope of our FIP workplan.

Challenges include staff capacity to implement monitoring and manage, analyze, and report on monitoring data for an increasing number of restoration projects; identifying, staying current, and contributing to the development of emerging methods for monitoring large, complex habitat restoration projects; and linking biological responses, particularly fish population responses, to the physical conditions resulting from stream habitat and streamflow restoration. These challenges are in many ways also opportunities, particularly with regard to stream habitat restoration. We are presented with an opportunity to advance the practice of monitoring streams and innovative complex habitat restoration projects by 1) identifying a discrete set of methods, i.e. a protocol, for efficiently measuring geomorphic and hydrologic conditions, and 2) describing the relationships between key ecological attributes, e.g. fish population



metrics, and geomorphic conditions. In this vein, monitoring of the Partnership's complex habitat restoration projects, specifically on Whychus Creek, will be presented at three conferences in 2019.

- 3) How have the results chain and/or measuring progress tables informed your partnership's approach to prioritizing projects for implementation, tracking progress, and monitoring and/or adaptive management?

Monitoring ecological outcomes of each Partnership restoration strategy was refined in response to results chains for Partnership watersheds, which are included in the Progress Monitoring Plan. The process of developing a results chain with local experts was particularly useful for identifying expected ecological outcomes and monitoring indicators for McKay Creek, a naturally intermittent stream where the ecological outcomes of restoration could be different than in perennial streams, and about which Partnership partners had less information than for other streams and rivers in the Partnership geography. The results chain and measuring progress tables are also useful as a reminder of the metrics we identified for tracking both implementation and ecological progress and continuing to align our monitoring indicators with these metrics in analysis and reporting.

The Partnership identified FIP restoration projects a priori as part of our SAP and assigned the year we anticipated projects being implemented based on evaluation of project readiness. We consider all projects included in the SAP to be important for successful restoration of aquatic habitat for native fish and reintroduced salmonids within the Partnership geography, and projects are implemented when a number of factors, including funding and social license, are aligned. Thus, the order in which projects are implemented is informed by these factors rather than by a strict prioritization process.

- 4) How has the partnership's Strategic Action Plan evolved and/or been modified during the biennium?

In 2019, the Deschutes Partnership will update our FIP workplan to include Crooked River stream habitat restoration. The Partnership will present a change of scope memo to the OWEB Board at the January 2019 meeting for inclusion in the 2019-2021 biennium.

Habitat restoration in the Crooked River is a restoration action currently included in the Partnership SAP (SAP, p. 18, Objective 2.3.2.1) with implementation set to begin in 2022. The primary reason for delaying these activities until 2022 was that our initial focus for the Crooked River portion of the FIP was on funding and constructing fish passage at Opal Springs. Now that the Opal Springs project is funded and under





construction, we can consider advancing additional opportunities to implement SAP habitat restoration objectives for the Crooked River.

The Partnership's change in scope does not substantively change our FIP work plan or SAP, it simply advances the timing of activities to take best advantage of new projects and leverage opportunities. In addition, the change in scope will not displace other work—we've reviewed program needs for the upcoming biennium and concluded that these actions are both ripe and high-priority, our established measure for moving projects forward.

- 5) Beyond project implementation discussed in question 1, describe the challenges and successes that the partnership has encountered during the biennium. How has your partnership evolved as a result? What are the lessons learned through these experiences that will benefit the partnership in the future?

#### FIP Technical Review Team Process

Early in the biennium the Deschutes Partnership began working with OWEB staff to clarify the technical review process each OWEB grant must undergo. Previous technical review team (TRT) meetings had raised concerns regarding the roles of both reviewers and applicants and the goals of the TRT process, warranting clarification. OWEB staff listened to these concerns and worked collaboratively with both TRT reviewers and the Partnership to better structure the TRT process while still meeting OWEB's statutory obligations for technical review.

In February 2018, OWEB issued a memo to TRT reviewers and the Partnership outlining the structure and function of TRT meetings, clarifying the roles of participants and identifying three primary goals of the TRT process. Our most recent TRT meeting in October 2018 was the first meeting since the issuance of the memo and was regarded by the Partnership as the most productive TRT meeting of our FIP to date. The discussions were detailed and meaningful, yielding comments and suggestions from TRT reviewers that will ultimately benefit project development. OWEB facilitation of the meeting made for clear participant communication and identification of action items. The Partnership appreciates OWEB's diligence and collaborative approach to helping us find a way to make the TRT process meaningful to all parties.

#### Staff changes

Two of the Partnership's organizations are currently undergoing leadership transitions, resulting in new representatives at the Partnership table. Kate Fitzpatrick will replace Tod Heisler as the Deschutes River Conservancy representative and Kolleen Miller will be the acting representative for the Upper Deschutes Watershed Council. While leadership transitions can be disruptive, the commitment of the individual organizations



to the work of the Partnership has ensured the diligent appointment of thoughtful replacement representatives.

6) Describe how your partnership has leveraged additional resources (direct and in-kind)?

RCPP

The Crooked River Watershed Council received a \$6.5M Regional Conservation Partnership Program grant from Natural Resources Conservation Service for work in the lower Crooked River watershed. This five-year grant will leverage FIP funding to protect riparian areas through NRCS Farm Bill programs including the Conservation Reserve Enhancement Program and Environmental Quality Incentives Program.

McKay Creek

The Partnership's recent FIP Technical Assistance grant for a largescale streamflow restoration project on McKay Creek revealed a significant increase in project cost due to irrigation infrastructure improvements needed for project implementation. Total project costs now leave a shortfall of approximately \$5.6-6.1M. As the project is crucial to restoring streamflow to a major Crooked River tributary and supplying reintroduced steelhead and salmon access to suitable spawning grounds, the Partnership is working hard with its project partners to close this funding gap by leveraging current restoration investment, including FIP funding.

One possibility is funding under the Natural Resources Conservation Service's (NRCS) Watershed Protection and Flood Prevention Program (PL-566), which will provide funds for the irrigation infrastructure improvements key to project implementation. Though PL-566 funding for the Deschutes basin is politically charged and highly competitive, the Partnership believes it can package the McKay Creek streamflow restoration project with the irrigation infrastructure improvement projects to develop a competitive application for PL-566 funds.

## The Deschutes Partnership

2015-2017 Biennium

UDWC = Upper Deschutes Watershed Council

CRWC = Crooked River Watershed Council

DRC = Deschutes River Conservancy

DLT = Deschutes Land Trust

Partnership Lead	Project Name	Project Type	OWEB Grant Award	Leverage Funds	Status	Notes
UDWC	Deschutes Partnership Capacity	Capacity Building	\$95,000	\$23,860	Completed	
CRWC	Opal Springs Dam Volitional Fish Passage Phases 2 & 3	Restoration	\$2,500,000	\$8,720,486	Active	
DRC	Three Sisters Irrigation District Main Canal Phase 8	Restoration	\$258,695	\$1,196,084	Completed	
DLT	Aspen Lakes (Willow Springs) Land Acquisition	Land Acquisition	\$450,000	\$397,922	Pending	Funding award complete. Grant agreement under review. November 2018.
DRC	McKay Creek Water Rights Switch	Technical Assistance	\$225,000	\$127,342	Active	
UDWC	Whychus Canyon Restoration Phase 2	Technical Assistance	\$121,000	\$41,050	Active	
UDWC	Plainview Diversion Passage/Screening Design	Technical Assistance	\$67,000	\$52,225	Active	
UDWC	Deschutes Partnership Community Outreach	Outreach	\$84,700	\$33,500	Active	
DRC	Three Sisters Irrigation District Main Canal Phase 9	Restoration	\$421,399	\$1,143,714	Completed	
UDWC	Whychus Watershed & Floodplain Monitoring	Monitoring	\$175,000	\$49,118	Active	
<b>Total</b>			<b>\$4,397,794</b>	<b>\$11,785,301</b>		
Total Award			\$4,000,000			
Balance			-\$397,794			

This balance is accounted for by \$397,794 that was carried forward from the Deschutes SIP, and is currently at \$0.

Table 7

## The Deschutes Partnership

2017-2019 Biennium

UDWC = Upper Deschutes Watershed Council  
CRWC = Crooked River Watershed Council

DRC = Deschutes River Conservancy  
DLT = Deschutes Land Trust

Partnership Lead	Project Name	Project Type	OWEB Grant Award	Leverage Funds	Status	Notes
UDWC	Deschutes Partnership Capacity	Capacity Building	\$123,900	\$31,018	Active	
DLT	George Property Acquisition	Land Acquisition	\$825,000	\$313,719	Pending	DLT and OWEB staff updating application and evaluation/funding award materials to include Williams SIP Property Acquisition. November 2018.
UDWC	Creekside Park Fish Passage and Habitat Restoration Project	Technical Assistance	\$125,000	\$65,661	Active	
DLT	Aspen Lakes (Willow Springs) Land Acquisition (additional funds to those allocated in 2015-2017 biennium to complete the project)	Land Acquisition	\$113,750	\$0	Pending	Funding award complete. Grant agreement under review. November 2018.
CRWC	Lower Crooked River Landowner Engagement Project	Stakeholder Engagement	\$49,536	\$30,216	Pending	Proposal submitted and reviewed October 2018. Funding award pending Board approval of proposed scope of initiative change.
CRWC	Lower Crooked River Baseline Monitoring	Monitoring	\$54,890	\$77,400	Pending	Proposal submitted and reviewed October 2018. Funding award pending Board approval of proposed scope of initiative change.
UDWC	Whychus Watershed & Floodplain Monitoring	Monitoring	\$150,000	\$39,555	Pending	Project funded. Grant agreement in development. November 2018.
UDWC	Plainview Fish Passage and Screening Project	Restoration	\$200,000	\$454,800	Pending	Project funded. Grant agreement in development. November 2018.
CRWC	Lower Ochoco Creek Fish Passage and Screening	Restoration	\$123,779	\$39,100	Pending	Proposal submitted and reviewed October 2018. Funding award pending Board approval of proposed scope of initiative change.
UDWC	Willow Springs Preserve Restoration Design Project	Technical Assistance	\$150,000	\$56,825	Pending	Project funded. Grant agreement in development. November 2018.
UDWC	Barton & Allen Diversions Passage/Screening	Restoration	\$45,000	\$30,000	To Be Submitted	Proposed for Spring 2019.
UDWC	Sisters City Park Stream Restoration (Creekside REST)	Restoration	\$100,000	\$80,000	To Be Submitted	Proposed for Spring 2019.
UDWC and DLT	Outreach - Whychus - UDWC and DLT	Stakeholder Engagement	\$125,000	\$40,000	To Be Submitted	Proposed for Spring 2019.
DRC	McKay Exchange Phase I	Restoration	\$1,500,000	\$1,500,000	To Be Submitted	Proposed for Spring 2019.
CRWC	EM Monitoring - Lower Crooked	Monitoring	\$80,000	\$20,000	To Be Submitted	Proposed for Spring 2019.
DLT	Ochoco Preserve (George Property) Restoration Design	Technical Assistance	\$200,000	\$75,000	To Be Submitted	Proposed for Spring 2019.
	<b>Total</b>		<b>\$3,965,855</b>	<b>\$2,853,294</b>		
	Total Award		\$4,000,000			
	Balance		\$34,145			

Table 8



## **OWEB Focused Investment Partnerships 2017-2019 Biennial Reporting**

### Written Reporting Questions

*(To be submitted to your OWEB FIP Project Manager no later than November 30, 2018)*

Name of Partnership: Willamette Anchor Habitat Working Group (WAHWG)

Please address the following questions *(in five pages or fewer)*:

- 1) How is your partnership making progress toward achieving its implementation objectives (outputs)? What factors (positive or negative) have impacted your ability to achieve your identified goals?*

The partnership is making anticipated progress. We conduct our formal implementation reporting each December and so our 2018 reporting has yet to occur. As of the end of 2017, we had met 31% of our cumulative ecological targets for 2022. In response to an opportunity the group saw to refine our targets, a breakout group met and identified three sub targets that support our ecological actions. These will be rolled out and tested in our upcoming 2018 data collection effort.

With respect to our outreach targets, in 2017 we exceeded our anticipated progress toward educational targets (51% progress towards our 2022 goal). We are on track with volunteer targets (25% towards 2022 goal) and identified a need to revisit our outreach targets for salience to key audiences. The groundwork here is complete and we will roll out the revisions in our upcoming implementation data collection for 2018.

The partnership has been quite successful at implementing projects that expand the extent and health of floodplain forests but has found it more difficult to complete projects that involve earthwork (floodplain reconnection & side channel construction). Challenges include permitting, which has been a major hurdle. Bureaucratic red tape has hindered some partner's ability to do the significant earthwork that would result in big changes. The partnership would benefit from high level agreements between Army Corps, NOAA, SHPO, DSL, DEQ and the Counties to agree that all of these agencies want this work to happen.

One other challenge the partnership has been grappling with is the ability of partners to cultivate relationships/projects with willing landowners along the mainstem of the Willamette. The majority of our projects are taking place on public or otherwise protected land. Many partners have found it difficult to implement successful and impactful projects on private land due to the time and energy it takes to build these relationships and the uncertainty surrounding the future funding landscape in the Willamette. The partnership is exploring ways to engage



with private landowners in a way that continues to build trust and illuminates the value of our work now and into the future.

- 2) *Describe how on-going and proposed monitoring activities will measure ecological progress? Is the partnership on a trajectory to measure ecological outcomes? What challenges and opportunities do you see in this work?*

The Effectiveness Monitoring program for the partnership is focused on measuring changes in physical habitat that directly relate to WAHWG restoration activities and placing these changes within the context of broader floodplain processes. Because restoration projects directly change hydrologic, water quality and geomorphic conditions, our monitoring prioritizes data collection to assess hydrogeomorphic responses in different seasons that directly relate to native fish needs for different times of the year. Vegetation monitoring is also an important component. We recognize the long timescales for floodplain forests to establish and ecological benefits of re-vegetation to be realized, so we are developing monitoring approaches that assess changes in vegetation and the ecological responses to reforestation. Additionally, we are developing strategic monitoring indicators, metrics and approaches for assessing fisheries responses, focusing on clear linkages between restoration actions, changes in physical habitat and associated response by fisheries community. All monitoring plans are closely coupled with the WAHWG Results Chain.

The WAHWG Monitoring Program leverages expertise among key institutions that have a long-term commitment to this endeavor: these organizations include: USGS, BEF, TNC (leading the monitoring program); with fisheries experts from USFS and ODFW leading the fisheries monitoring; limnologists from PSU leading coupled water-quality and plant responses to Ludwigia treatment; hydrologists from USGS leading temperature, inundation, geomorphic changes and vegetation experts from TNC, USGS and other groups leading the vegetation monitoring.

- 3) *How have the results chain and/or measuring progress tables informed your partnership's approach to prioritizing projects for implementation, tracking progress, and monitoring and/or adaptive management?*

We have used the results chain to inform prioritization of effectiveness monitoring questions. We view the results chain as a map of key assumptions, grounded in best available science, regarding how outputs relate to desired ecological impacts on aquatic habitats for native species. Seeing these assumptions laid out in the results chain has allowed us to hone in on the places where key questions and ecological impacts are in greatest need of focused monitoring. We have not used the results chain to directly inform our implementation monitoring because targets are essential for adaptive management, and the targets we have identified do not seamlessly align with those identified in the results chain. The results chain also allowed us to



think creatively about how indicators could be used to efficiently assess effectiveness of key actions. For example, we are planning to use an avian indicator of vegetation health to assess effectiveness of native riparian forest community enhancements over time. This shift was only possible as we reflected on the fact that other more common measures were not shedding light on key effectiveness questions relating to revegetation actions.

For now, our adaptive management process is guided by implementation monitoring, but when we have made more cumulative implementation progress we expect to derive information from effectiveness monitoring to inform adaptive management at different scales.

The temporal linkages made among limiting factors in the results chain and anticipated near-long term impacts has been extremely helpful in allowing us to scale expectations across stakeholder groups and plan our monitoring efforts.

*4) How has the partnership's Strategic Action Plan evolved and/or been modified during the biennium?*

There have been no changes made to the Willamette Action Plan since it was created in 2015. However, supplemental documents have been created that are helping to guide our work. Oregon Parks and Recreation Department (OPRD) completed a restoration and stewardship action plan for OPRD-managed properties in the Willamette Basin. The Willamette Aquatic Invasive Network is also in the midst of working on a prioritization exercise and drafting an action plan for addressing the restoration of off channel habitat and other locations where aquatic invasive plants are persisting. This plan will hopefully be completed by the late spring of 2019 and will inform updates to our strategic plan.

*5) Beyond project implementation discussed in question 1, describe the challenges and successes that the partnership has encountered during the biennium. How has your partnership evolved as a result? What are the lessons learned through these experiences that will benefit the partnership in the future?*

A major challenge the partnership has encountered this biennium is a transition in leadership. Dan Bell served as chair of the working group since its inception and left the role early in 2018. The partnership worked through the first half of 2018 to bring on a new Chair. Adam Zucker was brought on to provide technical support to the partnership in the early spring, and in mid 2018 the partnership brought on Taylor Larson to chair the partnership. Getting up to speed on such a complex partnership has taken some time and it has been a challenge for the group to adjust to a more dispersed leadership style. Taylor was relatively unfamiliar with the working group prior to taking on a coordination role which made it hard to hit the ground running. As a partnership going forward we are working to become more resilient to change by working to build leadership capacity across organizations within our group.





Another challenge for our partners is a result of the wide breadth and geographic spread of the WAHWG, the large number of stakeholders in the basin, and the wide range of issues that the Partnership could be focused on. Because of these factors, there are a wide range of other partnerships operating in the basin, and many have partially overlapping goals or geography as the FIP Partnership. A few examples include: Rivers to Ridges, Willamette Aquatic Invasives Network, Willamette Mainstem Cooperative, and others. There have been times when our partnership has tried to widen our focus to bring in more of those partners and provide more varied topics during meetings. In the end, we have honed our focus to maintain an emphasis on mainstem-specific issues, science, and projects. We will continue to coordinate with the partners and stakeholders related to that geography. One emerging opportunity is the development by Meyer Memorial Trust and others of a new Willamette River Network model to continue the work of the Willamette River Initiative into the future. The development of this new model and an organization that will eventually lead it has been ongoing for a few years, and we are grateful for MMT's ongoing support of restoration investments in our three-partner funding collaborative through the life of the Willamette FIP.

6) *Describe how your partnership has leveraged additional resources (direct and in-kind)?*

The ability to leverage the FIP funding with funding from other entities has been a major positive influence on our partnership's ability to achieve our goals. The primary matching funders have been BPA and Meyer Memorial Trust, but also recently some private funding and some funding from a water utility have been used to leverage FIP funds. Additionally, our Partnership has been working hard to coordinate the design of projects with the latest science to ensure methods and actions are as beneficial as possible for our target species. USGS, PSU and OSU are some of the partners who are performing scientific inquiries and studies that relate directly to our partnership's work. A few examples include studies of how juvenile Chinook utilize gravel bars, the role of cold water spots in fish biology, improving the ability to predict where cold water spots are located, and understanding the cascading effects of aquatic invasive species on water quality and native aquatic plant communities.

BEF has worked to leverage non-profit and corporate investments in AHWG FIP projects and we saw a number of successes in 2017-2018:

- A. Working with Intel and Coca-Cola, we leveraged an additional \$310,000 for 2018-2019 actions of three AHWG partners whose projects deliver water-related benefits: Little Willamette (Greenbelt LT), Bowers Rock (Calapooia WC) and Snag Boat Bend (Long Tom WC).
- B. BEF was awarded \$67,340 from the Arbor Day Foundation for plants for the 2017 and 2018 planting seasons. Approximately 60% of these funds supported projects that are part of the AHWG FIP.





- C. Nonprofit partner One Tree Planted worked with BEF to generate over \$80,000 in tree planting-related funding offsets, 100% of which were directed to 13 Willamette partners, 10 of whom are AHWG partners.
- D. A professional film crew was contracted by One Tree Planted to create a six-minute film short at the Willamette Mission FIP site. The film profiles a day in the life of a tree planter and will be screened in Portland at the 2019 Wild and Scenic Film Festival.

## Willamette Mainstem Anchor Habitat Working Group

2015-2017 Biennium

Partnership Lead	Project Name	Project Type	OWEB Grant Award	Leverage Funds	Status	Notes
The Nature Conservancy	Willamette Confluence Middle Fork Restoration	Restoration	\$675,001	\$547,909	Active	
Calapooia Watershed Council	Bowers Rock Phase 1	Restoration	\$94,000	\$44,102	Active	
Willamette Riverkeeper	Willamette Mission Floodplain Reforestation Phase 4	Restoration	\$295,420	\$436,040	Active	
McKenzie River Trust	Green Island Floodplain Phase 4	Restoration	\$62,631	\$431,883	Active	
Long Tom Watershed Council	Snag Boat Bend Floodplain Restoration Phase 3	Restoration	\$200,000	\$294,872	Active	
Long Tom Watershed Council	Sam Daws Landing Phase 3 Restoration Design	Technical Assistance	\$60,000	\$5,247	Active	
Bonneville Environmental Foundation	Willamette Mainstem Anchor Habitat Working Group Partnership Coordination	Capacity Building	\$70,005	\$17,690	Completed	
Willamette Riverkeeper	Willamette Mission Floodplain Reforestation Phase 4 - Channel Monitoring	Monitoring	\$55,219	\$25,654	Active	
McKenzie River Trust	Green Island - Bull Pen	Restoration	\$100,130	\$112,371	Active	
Willamette Riverkeeper	Gail Achterman, Phase 1	Restoration	\$95,143	\$270,340	Active	
Greenbelt Land Trust	Horseshoe Lake, Phase 2	Restoration	\$158,698	\$41,760	Pending	Grant agreement complete, waiting for grantee to resolve outstanding reports. December 2018.
Long Tom Watershed Council	Sam Daws Landing/Snag Boat Bend Restoration	Restoration	\$299,947	\$22,500	Active	
Calapooia Watershed Council	Calapooia Confluence	Technical Assistance	\$30,000	\$16,352	Active	
Willamette Riverkeeper	Willamette Mission Floodplain Reforestation Phase 5	Restoration	\$213,516	\$334,157	Active	
Benton SWCD	Willamette Anchor Habitat Working Group Monitoring Framework	Monitoring	\$129,954	\$40,033	Active	
<b>Total</b>			<b>\$2,539,664</b>	<b>\$2,640,910</b>		
Total Award			\$2,550,000			
Balance			\$10,336			

Table 11

## Willamette Mainstem Anchor Habitat Working Group

2017-2019 Biennium

Partnership Lead	Project Name	Project Type	OWEB Grant Award	Leverage Funds	Status	Notes
Bonneville Environmental Foundation	Willamette Mainstem Anchor Habitat Working Group Partnership Coordination	Capacity Building	\$101,661	\$25,515	Active	
Luckiamute Watershed Council	Luckiamute State Natural Area Floodplain Reconnection and Reforestation	Restoration	\$168,331	\$347,561	Pending	Project funded and grant agreement in development, December 2018.
Calapooia Watershed Council	Bowers Rock Phase 2 Implementation	Restoration	\$547,000	\$593,114	Pending	Project funded and grant agreement in development, December 2018.
Friends of Buford Park	Glassbar Island Floodplain Reforestation	Restoration	\$124,500	\$127,747	Pending	Technical review complete, September 2018. Funding award and grant agreement in development, December 2018.
The Nature Conservancy	Willamette Confluence Lower Middle Fork Revegetation	Restoration	\$321,324	\$80,349	Pending	Technical review complete, September 2018. Funding award and grant agreement in development, December 2018.
Benton SWCD	2019 Data Collection for WFIP Effectiveness Monitoring	Monitoring	\$119,983	\$58,000	Active	
Long Tom Watershed Council	Snag Boat Bend - Alternatives Analysis and Project Design	Technical Assistance	\$75,000	\$15,000	Active	
Long Tom Watershed Council	Snag Boat Bend Floodplain Reforestation	Restoration	\$290,000	TBD	To Be Submitted	Proposed for 2019.
Long Tom Watershed Council	Sam Daws Landing Floodplain Reforestation (Gravel Pit)	Restoration	\$240,000	TBD	To Be Submitted	Proposed for 2019.
Greenbelt Land Trust	Horseshoe Lake - Hydrological Restoration	Restoration	\$86,406	TBD	To Be Submitted	Proposed for 2019.
Willamette Riverkeeper	Willamette Mission Floodplain Reforestation, Phase 5 (Channels and Riparian Edges)	Restoration	\$270,864	TBD	To Be Submitted	Proposed for 2019.
Calapooia Watershed Council	Albany Oxbow System	Technical Assistance	\$80,000	TBD	To Be Submitted	Proposed for 2019.
			<b>Total</b>	<b>\$2,425,069</b>	<b>\$1,247,286</b>	
			Total Award	\$2,445,000		
			Balance	\$19,931		

Table 12



## OWEB Focused Investment Partnerships

### 2017-2019 Biennial Reporting

#### Written Report

Name of Partnership: Grande Ronde Restoration Partnership

- 1) How is your partnership making progress toward achieving its implementation objectives (outputs)? What factors (positive or negative) have impacted your ability to achieve your identified goals?

The Partnership is making great progress in meeting implementation objectives. Working with Bonneville Environmental Foundation, the partnership identified 11 outputs and five reductions in limiting factors that we would measure to track progress. The most significant progress has been made in the areas of research, monitoring and landowner relationships. Although, the pace of instream and riparian restoration project implementation is beginning to speed up with the completion of the Dry Creek Aiwahi-Cisco Habitat Restoration Project and the Upper Grande Ronde River Bird Track Springs Restoration Project underway. Initially the partnership experienced a bottleneck in our capacity to fund technical engineering designs, but the flexibility in the FIP program for the Partnership to focus money where it is most needed has proven to be very helpful. After the first biennium, it was clear the partners needed even more technical assistance to stay on schedule with implementation. The Partnership benefits from technical assistance provided by the Bureau of Reclamation and Bonneville Power Administration, but they were unable to handle the increased workload associated with FIP projects so we needed other options. In this biennium, two more projects have received FIP funding for technical assistance and are now moving ahead on schedule.

The process meeting NHPA Section 106 requirements has also been a limitation to achieving our objectives on time with most projects experiencing a one- to two-year delay, without a clear understanding of what requirements will be from one project to the next. The Grande Ronde Model Watershed is working with BPA to provide some training for the partners, along with some additional funding to keep cultural resource surveys moving forward on time.

- 2) Describe how on-going and proposed monitoring activities will measure ecological progress? Is the partnership on a trajectory to measure ecological outcomes? What challenges and opportunities do you see in this work?

The Partnership identified four outcomes that we hope to achieve through the FIP.

1. **Improve knowledge of factors affecting survival rates of wild spring Chinook salmon, summer steelhead and bull trout.** The Partnership has engaged in three separate efforts to improve our understanding of native fish species and what factors are affecting productivity, survival and abundance. First, working with CRITFC, ODFW and OSU, we evaluated how fish carcass additions affect growth of native fish during summer rearing. An OSU graduate student proposed carcass additions to determine if we can improve poor survival rates of out migrating smolts by improving growth rates of juvenile fish. The results showed increased growth of juvenile fish the first year, mostly due to direct consumption of eggs from the carcasses. Results from the second year of research are forthcoming.



ODFW and partners are working to install PIT Tag arrays in critical locations in an effort to improve our understanding of these same native fish populations. We have installed an array on the upper Grande Ronde River near Starkey and one is currently being built that will be installed on Catherine Creek, downstream of Union. These two locations will provide important migration timing, habitat use and survival information for Chinook salmon and steelhead.

The third effort is being led by the USFS Pacific Northwest Research Station (PNW). They are looking at a number of metrics on Meadow Creek to determine the effectiveness of an instream restoration project completed in 2014. PNW and partners are studying fish response, instream habitat change, riparian recovery, effects of cattle and wild ungulate browse in riparian areas, pollinators and more. Recently, at the request of local partners, they also incorporated research to look at the effectiveness of Plantskydd, a liquid browse deterrent applied to riparian plantings. The hope is that this product can effectively deter wild ungulate browse and provide another alternative for riparian plant protection.

2. **Improve habitat quantity for all life stages of spring Chinook salmon, summer steelhead and other native species by protecting and restoring watershed processes and function, cold water refugia, and diverse, complex instream and floodplain habitats.** The Partnership has been utilizing the data from an existing monitoring program, the Columbia Habitat and Monitoring Program (CHaMP), to measure the increase in habitat quantity and quality as a result of restoration projects being implemented. Unfortunately, that program was defunded by BPA and is no longer operational. The partnership has worked to develop an alternative to measure progress. OWEB's willingness to provide supplemental monitoring funds will allow us to collaborate with the ODFW Aquatic Inventories Program and complete additional habitat and snorkel surveys within the Initiative Area. Some of these surveys will be completed for the first time on streams within the Initiative Area and serve as baseline data. The challenge in these areas will be securing funding to do repeat surveys once all the planned work is complete. In other streams within the Initiative Area these repeated surveys will help tell the story of how much the habitat has changed due to implemented actions. Consistent metrics will be measured to tell the story of change in habitat quantity including pools/mile, LWD pieces/100 meters, side channel length and main channel length.
3. **Increase habitat quality and diversity for all life stages of spring chinook salmon, summer steelhead and other native species.** Similar to monitoring for changes in habitat quantity, this outcome will be measured through habitat surveys. Metrics to determine change in habitat quality include pools >1 meter deep, sediment composition, cover and width-to-depth ratio. Stream temperatures and flows are being measured independently of habitat surveys by the partners and will be critical metrics in determining improvements in habitat quality. Additionally, partners usually collect basic monitoring data through photo points, aerial imagery, plant surveys and topographical surveys.
4. **Promote and build trusting relationships and partnerships with private landowners and public land managers to promote long-term ecologically-based conservation ethics.** The Partnership views this as an ongoing goal and knew it would take more landowner and



public engagement to be successful in implementing our FIP. Therefore, if we are successful in implementing our FIP, we have been successful in engaging and working with our community. So far, we have engaged fourteen different landowners about implementing restoration projects on their property. Additionally, we have collaborated with public land managers to improve our watershed conditions and leverage the relationships that specific members of the Partnership have with individual user groups. The partners are continually providing technical assistance and training to landowners, students and civic groups to increase awareness.

Ecological outcomes will be measured through analyses of the study results and monitoring data described above. The technical results of the three study efforts will be used to inform future project planning in the Grande Ronde River Sub-basin and this information will be combined with other known information to refine prioritization strategies and focus on recovery of key salmonid populations. The habitat quantity and quality monitoring data will provide information to measure project effectiveness of achieving physical condition goals and objectives and will be incorporated into an adaptive management approach to project planning and technical design. A significant challenge will be finding the capacity to analyze the data and monitoring results to ensure we properly incorporate the new information into future planning.

**3) How have the results chain and/or measuring progress tables informed your partnership's approach to prioritizing projects for implementation, tracking progress, and monitoring and/or adaptive management?**

The results chain forced us to focus on how we would determine success early on in the management of the FIP. It is easy to focus entirely on the process of project implementation (landowners, permitting, planning, design, funding) and not plan to measure improvement.

The results chain has facilitated the upfront planning needed to monitor progress.

The partners in the basin have tried a variety of methods to measure change in habitat quality and quantity. The approach we keep coming back to is a consistent set of metrics measured in the Aquatic Inventories survey paired with snorkel surveys (metrics mentioned in response to question 2).

Recently the partners are looking into using Life Cycle Models (LCMs) developed at the NOAA science center. The Grande Ronde LCMs were designed to accept estimated changes in specific life stage survivals and capacities. The primary input parameters used to model historical, current, and four strategy specific restoration scenarios are multipliers reflecting the expected changes in parr rearing capacity and out-migrant survivals. In the model, over-wintering survival is linked to summer parr density reflecting the strong patterns in the empirical data sets for the Upper Grande Ronde, Catherine Creek, Minam, and Lostine/Wallowa Chinook salmon populations. A key working assumption of the approach is that the tributary stage production and survival relationships we derived from the 20 plus year adult spawner and juvenile data sets are related to the estimates of available habitat generated using the Oregon AQI data sets. We assume that habitat actions that would increase or decrease those levels over time would proportionally translate into changes from the derived parr capacities for each



population. Results from these four restoration strategies are currently being modeled and will be written up in a technical memo from NOAA's NW Science Center by the end of the year.

4) How has the Partnership's Strategic Action Plan evolved and/or been modified during the biennium?

The Partnership's SAP has been modified in several ways during this biennium. We recognized the need for better coordination in our monitoring efforts and hired a Monitoring Network Coordinator at GRMW to assist the Partnership in working as a team and minimizing redundancies in monitoring. We also underestimated the technical assistance capacity of the Partnership members. Initially we relied too heavily on BOR and BPA for engineering assistance, whose capacity we had overestimated (OWEB FIP committee members questioned whether we had allowed enough for TA during the initial evaluation process-seems they were right and we were wrong). Fortunately, we have been able to increase the amount of technical assistance design funding in our FIP. Additionally, two projects have been removed due to losing landowner support. The partners have also needed to delay some projects into a future biennium, and accelerate other projects ahead a biennium. The change of biggest magnitude has been the Catherine Creek Hall Ranch project. Initially this project was planned to be a small-scale side channel project that would also provide some protection to the existing highway (OR HWY 203). The partners invested in technical design of this project and ODFW even secured OWEB FIP funding to complete the implementation. During this time, the opportunity arose to drastically increase the scope and scale of this project and not just enhance side channel habitat and protect a highway, but completely move the highway out of the floodplain and design a large-scale side channel and floodplain restoration project. The change was largely brought on by the willingness of the new ODOT regional manager, Ace Clark, to consider relocating the highway. Previously ODOT had insisted that moving the highway was not an option. Once ODOT became supportive of the highway relocation alternative, the plans changed, and the existing OWEB FIP grants were cancelled. Currently a new proposal for the expanded project is being considered to finish designing the habitat portion of this large floodplain project. We were also able to leverage significant funding from Bonneville Power Administration and ODOT to complete the designs for the new highway.

5) Beyond project implementation discussed in question 1, describe the challenges and successes that the partnership has encountered during the biennium. How has your partnership evolved as a result? What are the lessons learned through these experiences that will benefit the partnership in the future?

One major challenge has been the changes we have experienced in the Core Partners and in the larger implementation partnership in the basin. Recently, the Grande Ronde ODFW Fish Habitat Program, funded primarily by BPA, experienced a budget cut which reduced their capacity. ODFW is one of the core implementers and this will affect both the amount of implementation and monitoring they can achieve. Another recent change in the partnership that has been both a challenge and a success is an agreement between BPA and the USFS Region 6, called the Headwaters Initiative (HI). This agreement between two federal agencies is





a positive change in that the USFS is able to bring some additional funding to the basin that will be matched by BPA. The challenging part has been trying to work out the details of which projects they will be doing, how they will be funded and which partners will be needed for assistance. CTUIR has taken on a large three-year project on the Wallowa Whitman that is part of the HI. The CTUIR Habitat Program is very experienced and is a logical partner for this project but it has also taken their time away from a couple large FIP projects they had planned in Biennium 3. The partners have worked to decide how to re-allocate those biennium 3 funds, particularly in directing those funds towards the Catherine Creek Hall Ranch project that has grown substantially in scale and cost. Another challenge has been the arrival of a new implementation partner in the basin. The Bureau of Reclamation funded a project manager position for Trout Unlimited in the Grande Ronde Basin. This addition has not affected the FIP core partnership directly, but there are always challenges when new partners arrive and try to find a niche where they can be most successful. The overall success of the partnership is evident in several large projects being developed with the help of FIP funds and OWEB support. Members of the Partnership must also recognize a challenge with meshing the subtle differences in agency focus and project goals between each member and between matching funders. Each implementing partner agency and each of the matching fund agencies have a slightly different emphasis that defines project success and the willingness to fund implementation. These differences combined with the various goals of landowners and land managers can make it difficult to settle on project actions that are acceptable by all stakeholders. Developing clear project goals and objectives through thorough communication and trusting relationships, as described under Question 2, can help to alleviate this challenge.

**6) Describe how your partnership has leveraged additional resources (direct and in-kind)?**

The Partnership has continued to leverage additional funding and technical services from BPA, USFS, BOR, ODOT and others. The Partnership has also been successful in securing funding from other sources like McNary Mitigation Fund, Federal Lands and Access Program, CRITFC, NRCS and others. The USFS has been able to add an aquatic engineer in our region to design projects on the Wallowa Whitman, along with valuable coordination in the Sheep Creek watershed to provide upland thinning projects that will supply wood for instream restoration. Another example of how we have been able to leverage additional resources is the Catherine Creek Hall Ranch Project. The project has grown substantially and now the partners, led by ODFW Habitat Program, are planning to move the highway out of the floodplain and implement a large restoration project in the core Chinook spawning and rearing reach of Catherine Creek. Having funds dedicated to this project in FIP has helped to secure BPA funds for highway relocation designs, the USFS was successful in getting a Federal Lands Access Program grant to resurface the new highway, and ODOT is contributing substantial in-kind to the design and construction of the new highway.



# Grande Ronde Restoration Partnership

2015-2017 Biennium

GRMWF = Grande Ronde Model Watershed Foundation

CTUIR = Confederated Tribes of the Umatilla Indian Reservation

Partnership Lead	Project Name	Project Type	OWEB Grant Award	Leverage Funds	Status	Notes
GRMWF	Hall Ranch Habitat Restoration	Technical Assistance	\$49,610	\$130,259	Active	Proposed for funds to be carried forward to obligate to a revised project grant agreement per pending OWEB Board action January 16, 2019 (similar to Hall Ranch REST funds listed below).
GRMWF	Grande Ronde Basin Monitoring	Monitoring	\$167,330	\$30,098	Active	
GRMWF	Grande Ronde Restoration Partnership - Restoration Outreach Coordinator	Outreach	\$29,772	\$39,560	Completed	
GRMWF	Meadow Creek Effectiveness Monitoring	Monitoring	\$15,000	\$170,474	Completed	
GRMWF	Fence Reconstruction Project within the Grande Ronde Watershed Project	Restoration	\$16,632	\$9,120	Completed	
GRMWF	Upper Grande Ronde Culvert Replacements Project	Restoration	\$87,505	\$385,337	Completed	
GRMWF	Hall Ranch Habitat Restoration	Restoration	\$0	\$0	Canceled	Funds carried forward for a revised project grant agreement per OWEB Board action June 27, 2018.
CTUIR	Bird Track Springs Restoration	Restoration	\$507,016	\$1,614,214	Active	
GRMWF	Whiskey Creek Courtney Ranch Restoration	Restoration	\$310,946	\$113,766	Active	
GRMWF	Grande Ronde River Bowman's Restoration	Technical Assistance	\$146,620	\$48,251	Active	
Union SWCD	Dry Creek Restoration	Technical Assistance	\$83,197	\$89,999	Active	
GRMWF	Upper Grande Ronde Carcass Addition Evaluation	Monitoring	\$18,095	\$122,194	Completed	
<b>Total</b>			<b>\$1,431,723</b>	<b>\$2,753,272</b>		
Total Award			\$1,771,610			
Balance			\$339,887			

This balance consists of the Hall Ranch Restoration funds that were canceled and carried forward to be used in a new Hall Ranch grant agreement.

Table 3

# Grande Ronde Restoration Partnership

2017-2019 Biennium

GRMWF = Grande Ronde Model Watershed Foundation

CTUIR = Confederated Tribes of the Umatilla Indian Reservation

Partnership Lead	Project Name	Project Type	OWEB Grant Award	Leverage Funds	Status	Notes
GRMWF	Sheep Creek Restoration Project	Restoration	\$73,632	\$1,074,076	Active	
GRMWF	Restoration and Monitoring Network Communications Coordinator	Capacity Building	\$61,200	\$114,000	Active	
GRMWF	Meadow Creek Restoration Effectiveness Monitoring	Monitoring	\$44,990	\$86,688	Active	
Union SWCD	Dry Creek Aiwohi-Cisco Habitat Restoration	Restoration	\$110,000	\$245,195	Active	
Union SWCD	Catherine Creek Red Mill Reach Restoration	Restoration	\$33,533	\$65,851	Active	
GRMWF	Woodlee Restoration Project	Restoration	\$112,382	\$496,888	Pending	Project reviewed October 2018. Funding award and grant agreement in development December 2018.
GRMWF	Catherine Creek - Hall Ranch Fish Habitat Restoration Project, Fish Habitat Design	Technical Assistance	\$238,350	\$706,390	Pending	Project reviewed October 2018. Funding award and grant agreement in development December 2018.
Union SWCD	Free Willow, Lower Willow Creek Fish Passage Design	Technical Assistance	\$250,000	\$65,936	Pending	Project reviewed October 2018. Funding award and grant agreement in development December 2018.
CTUIR/USFS	UGR Longley Meadows	Restoration	\$750,000	TBD	To Be Submitted	Proposed for Spring 2019.
GRMWF (ODFW)	Catherine Creek Hall Ranch Hwy 203 Relocation and Habitat Restoration	Restoration	\$1,118,242	\$5,000,000	To Be Submitted	Proposed for Spring 2019.
<b>Total</b>			<b>\$2,792,329</b>	<b>\$7,855,024</b>		
Total Award			\$2,416,500			
Balance			-\$375,829			

This balance would be accounted for with 2015-17 carry forward funds.

Table 4



## **OWEB Focused Investment Partnerships**

### **2017-2019 Biennial Reporting**

#### Written Reporting Questions

Name of Partnership: Harney Basin Wetlands Initiative

#### **1) How is your partnership making progress toward achieving its implementation objectives (outputs)? What factors (positive or negative) have impacted your ability to achieve your identified goals?**

The Harney Basin Wetlands Initiative is a diverse group of partners making tangible and authentic progress towards achieving Focused Investment Partnership implementation objectives for Harney County's Closed Lakes Basin wetland habitat. The overall goal of this Focused Investment Partnership is to enhance and restore a crucial ecosystem that is a magnet for migratory birds on the Pacific flyway while maintaining a sustainable ranching community in southeastern Oregon. The Initiative partners continue to meet regularly in facilitated meetings and are supported in collaboration and decision making by The High Desert Partnership.

#### **Aquatic Health and Carp Control**

Initiative partners completed the *Aquatic Health Basin-Wide Baseline* project during the biennium and delivered a technical report that provides (1) an update on the geographic range of carp in the basin and (2) baseline data on aquatic health conditions including water quality parameters, fish and macroinvertebrate communities, and submerged aquatic vegetation cover. We have not achieved our goal of establishing the geographic range of carp in the basin due to site inaccessibility issues and to the unfortunate misplacement of eDNA samples by a contracted laboratory. We were able to achieve our goal of collecting baseline data on aquatic health conditions in the basin, which will enable Initiative partners to monitor ecological progress in the Closed Lakes Basin habitat. The *Carp Dynamics and Ecosystem Development* project is on-going and will provide a systems model that will offer Initiative partners the ability to test alternative restoration strategies for Malheur Lake (e.g., windbreaks, lake subdivisions or water management). Multiple sub-models that will constitute the systems model have already been completed to better understand (1) the effects of annual lake-level fluctuation on carp recruitment and mortality, (2) how managers may use lake-level fluctuation to suppress the carp population below target thresholds, and (3) the sediment dynamics in Malheur Lake in response to environmental conditions and morphological features. This project has been positively influenced by the continued assistance from collaborators and has benefitted from the *Predictive Model for Light in Malheur Lake* project (on-going), which has enabled the timely quantification of key model parameters that will help inform the systems model. Initiative partners are also in the process of establishing target carp population parameters for Malheur Lake and will complete the *Carp Biomass Threshold* project in summer 2019 to achieve this goal. High Desert Partnership's Aquatic Health Coordinator has been instrumental in providing field coordination and ongoing field support for all projects.

#### **Flood Irrigated Wet Meadows**

Initiative partners from The Wetlands Conservancy, Eastern Oregon Agricultural Research Center and Malheur National Wildlife Refuge installed piezometers and conducted wet meadow surveys on privately-owned lands as part of the *Silvies River Floodplain and Vegetation* project. This project will increase the predictive ability of the state-and-transition model in understanding habitat management implications



and vegetation trends resulting from changing water regimes. Initiative partners also summarized the existing literature on wet meadows in the Harney basin during the biennium. A pair of workshops focused on wet meadow changes and existing management practices were organized and held in 2018 as part of the *HBWI Bi-2 Stakeholder Engagement* grant. Initiative partners invited landowners from the Silvies River floodplain and the Diamond/Malheur Refuge area to attend these workshops (total of 18 attendees) and developed a series of questions that allowed for productive conversations and sharing of information. The work undertaken by our partners will aid in the development and implementation of a community-based basin-wide wet meadow conservation strategy.

Initiative partners from Ducks Unlimited, the Harney County Watershed Council and the Natural Resources Conservation Service have been working with landowners to improve flood-irrigation infrastructure within the Focal Investment Priority Area. During the biennium, Ducks Unlimited was able to complete the Tyler Dam project design and is currently awaiting multiple permit clearances. Currently, we are expecting the Tyler Dam to be constructed in summer 2019. Engineering design is nearing completion for the Sweek Dam project and the permitting process has already been initiated. Sweek Dam is expected to be constructed in Fall 2019. Ducks Unlimited and Harney County Watershed Council have also submitted a survey/design application for the Dunn Dam and have already initiated project planning. Factors that have hindered our partners work include regulatory obstacles such as 'no-right' certifications and fish ladder requirements, which have delayed project timelines, significantly driven up project costs, and have led to one of our landowner pulling out of a project (i.e. King Dam project). The complexity of water rights has also affected our implementation of floodplain wet meadow management. Our partners have cleared many of these obstacles and are working to better understand the complexity of water rights to achieve our goal of improving irrigation infrastructure and water management efficiency to optimize habitat values for migratory waterbird species and forage production.

### **Communications and Outreach**

High Desert Partnership's Communications Coordinator has worked closely with our partners to ensure valuable stories, scientific findings, and project results are shared internally with all initiative partners, their constituents and Harney County residents. This work is directly tied to *HBWI Bi-2 Stakeholder Engagement* grant objectives and has been achieved through website updates, monthly newsletter updates, social media posts, event and meeting involvement, fact sheets and other outreach materials. The Communications Coordinator has also helped plan and implement events including the Migratory Bird Festival and Fair-in-the Field, which attracts Oregonians and out-of-state visitors to witness the spring arrival of hundreds of bird species into the basin and contributes to the positive perception of restoration work that's taking place in the basin. The Fair-in-the-Field event is a collection of our partners who set up stations in a flood meadow to engage Harney County's youngest stakeholders in the work being conducted in the basin.

Portland Audubon's Eastern Oregon Field Coordinator has also participated in community activities designed to engage a diverse set of stakeholders as part of the *HBWI Bi-2 Stakeholder Engagement* goals. On-refuge activities included bird tours for visitors during the spring and summer months, work parties at Benson Pond, and assisting refuge staff with school visits, Burns Paiute Youth Days, and the Carp Derby. Off-refuge activities included conducting monthly field trips and education programs with the Burns Paiute Tribe's youth program, assisting the Burns Paiute Tribe's Culture Camp with a natural resources program, and event tabling at the Harney County Chamber of Commerce monthly summer events. The Field Coordinator met most of Portland Audubon's docent goals from May through November but found



that engaging local community with the refuge was time consuming and took consistency and dedication to build community trust. High Desert Partnership and Portland Audubon are making great progress in achieving our goal of increasing awareness, coordination and support for restoration activities taking place in the basin.

**2) Describe how on-going and proposed monitoring activities will measure ecological progress? Is the partnership on a trajectory to measure ecological outcomes? What challenges and opportunities do you see in this work?**

Harney Basin Wetlands Initiative partners are on a trajectory to measure ecological outcomes as described in the Strategic Action Plan. Our partners now have basin-wide baseline data on water quality conditions, fish and macroinvertebrate communities, and submerged aquatic vegetation cover and can monitor changes in these parameters over time to determine if restoration strategies are having the intended ecological outcomes (e.g., increased water clarity, recovery of lake vegetation, and recovery of invertebrate fauna). The systems model from the on-going *Carp Dynamics and Ecosystem Development* project will also demonstrate the best restoration strategies and help our partners determine priorities for future funding and implementation.

The ecological outputs from the *Silvies River Floodplain and Vegetation* project will increase our understanding of ecosystem process and function in flood-irrigated wet meadows, leading to better management practices that will enhance habitat values, suppress invasive species, and optimize agricultural production. The state-and-transition model will also illustrate the multiple pathways of plant succession and will provide a toolbox for restoration, conservation, and management actions that will support the conservation of wet meadows and continued flood-irrigation in the basin. Once completed, this project will provide the baseline information and guidance needed for future restoration actions in the wet meadows and will support ecological outcomes by enhancing native wet meadow plant communities and increasing the retention and abundance of breeding and migratory wetland birds.

**3) How have the results chain and/or measuring progress tables informed your partnership's approach to prioritizing projects for implementation, tracking progress, and monitoring and/or adaptive management?**

The results chain and measuring progress tables have been used as communication and validation tools by partners to prioritize projects for implementation, track the progress of projects, and inform monitoring or adaptive management. As a communications tool, the results chain and measuring progress tables provide (1) a clear and agreed upon understanding regarding the theories and underlying assumption of how long-term goals are expected to be achieved through strategy implementation and (2) the timelines for when implementation objectives are to be completed. Having this information established (as a graphic and table) helps our partners explain project priorities, the progress of each project, and the metrics that need to be monitored to assess implementation/ecological progress. As a validation tool, the results chain and measuring progress tables help determine whether proposed projects and monitoring activities align with stated goals and objectives. Validating proposed projects and monitoring activities will ensure that the partnership is working towards achieving the goals stated in the Strategic Action Plan.

**4) How has the partnership's Strategic Action Plan evolved and/or been modified during the biennium?**



The Strategic Action Plan has evolved and undergone necessary modifications during the biennium. In the original plan, carp control was the partnership's primary strategy to improve water quality and aquatic health in Malheur Lake. With new information, partners realize that additional factors (e.g., wind stress) are now contributing to the lake's highly turbid and degraded conditions. Partners have since proposed, come to a consensus on, and implemented projects that will help inform a comprehensive systems model that will enable partners to test alternative restoration strategies for Malheur Lake (e.g., wind breaks, lake subdivision, or water management). The partnership has also modified some of the original SMART Goal timelines due to project implementation issues or new scientific findings.

Adaptive management is addressed in the Strategic Action Plan, but at the time of the application, the partners were not entirely sure where adaptive management would be needed or how it would be implemented. We plan on developing a fully adaptive management plan as our Strategic Action Plan continues to evolve and be modified. This management plan could serve as a one-stop place to hold our collective scientific and institutional knowledge, which can then be carried forward to future iterations of the process of restoring aquatic health and enhancing flood meadows. The management plan could reference our systems model, results of various investigations, decision making process, and other elements of the Initiative's work and could help in securing potential future funds and demonstrate that we are ready for action and success. We envision that a fully developed adaptive management plan will help our partners understand how to stay resilient and survive the loss of key individuals in the collaborative and will help to incorporate our collective knowledge so that we may build on it in the future.

**5) Beyond project implementation discussed in question 1, describe the challenges and successes that the partnership has encountered during the biennium. How has your partnership evolved as a result? What are the lessons learned through these experiences that will benefit the partnership in the future?**

The Harney Basin Wetlands Initiative continues to see strong engagement and dedication from collaborative partners and considers this to be a key factor to success for the project. Capacity funding through the Focused Investment Partnership has also been crucial for maintaining consistent progress. With this funding, High Desert Partnership has been able to hire talented staff who have guided progress and been invaluable to overcoming challenges during the biennium (e.g., staff turnover at the refuge after the occupation). High Desert Partnership staff are also dedicated in building awareness to engage new stakeholders and have built stronger internal partner communications. As a result, partners are now seeing increasing stakeholder interest and coalescing around projects. Key lessons to date include:

- 1. There is value in having the collaborative partners supported by an organization such as the High Desert Partnership to keep partners making decisions through consensus and providing grant management, communications, holding the collective knowledge of the initiative and overall coordination of the Focused Investment Partnership. Capacity funds have been critical for project implementation as they provide consistency, tracking and support to initiative partners.*
- 2. OWEB FIP investment in Harney County is more than an investment in restoration but also provides vital economic ripple-effect in sustaining community and our rural economy.*
- 3. The Results Chain has offered the partners a mechanism to track progress, but as the Strategic Action Plan continues to evolve, we believe adaptive management planning will be vital for long-term success.*



4. OWEB's role beyond a funder and as a partner in the Focused Investment Partnership, has been important to the Initiative's progress when we need to adapt or make changes to our projects as new information is learned.

5. The Harney Basin Wetlands Initiative partners are committed to long-term solutions and realize future funding must be sought to continue work in the Closed Lakes Basin wetland habitat.

**6) Describe how your partnership has leveraged additional resources (direct and in-kind)?**

Partners were able to leverage additional resources to meet, or exceed, OWEB's 25% project match requirement during the biennium (see table below). The ability to leverage additional resources can be attributed to our diverse partnership, our approach in planning and developing projects for implementation, and to our success in securing Environmental Quality Incentive Program (EQIP) funds through the Natural Resources Conservation Service.

For the partnership, project planning and development requires the involvement of a project manager and a variety of project partners from multiple organizations/agencies. Our project managers are experts within their respective fields and contribute, through their organization or agency, in-kind services such as project planning, development, implementation guidance and analyses. Initiative partners also play a critical role in project planning and development and provide additional resources such as capacity for project implementation, materials (e.g., housing, vehicles and equipment) and direct funds. Natural Resources Conservation Service also developed a 'Waterbird Initiative' prior to the 2017-2019 biennium that enabled us to have an exclusive EQIP budget. These EQIP funds are specifically intended to upgrade flood-irrigation infrastructure within the Focal Investment Priority Area and have been used as match for such projects.

Project Name	Project No.	OWEB Grant Award	Leveraged Funds	In-Kind	Cash
<b>2015-2017 Biennium</b>					
Aquatic Health Basin-Wide Baseline	216-8202-12979	\$56,619	\$64,776	\$64,776	\$0
Carp Biomass Threshold	216-8202-12981	\$100,996	\$28,098	\$18,498	\$9,600
Carp Dynamics and Ecosystem Development	216-8202-15445	\$213,684	\$65,191	\$65,191	\$0
Silvies Floodplain and Vegetation	216-8202-15444	\$79,541	\$19,548	\$14,832	\$4,716
Silvies River Irrigation Diversion Structure Replacement 1 -Tyler Implementation	216-8202-15442	\$295,009	\$82,042	\$3,300	\$78,742
Survey and Design for Sweek Dam Replacement Irrigation Diversion Structure	216-8202-15443	\$66,971	\$20,131	\$3,400	\$16,731
Silver Creek Sub-basin Lidar	216-8202-15441	\$320,004	\$227,461	\$45,476	\$181,985
Predictive Model for Light in Malheur Lake	216-8202-16092	\$170,794	\$43,473	\$43,473	\$0
Malheur Lake Restoration Alternatives Summit and Feasibility Analyses	216-8202-16094	\$102,404	\$25,968	\$25,968	\$0
HBWI Biennium 2 Stakeholder Engagement	216-8202-16093	\$50,961	\$45,800	\$45,800	\$0
	<b>TOTAL</b>	<b>\$1,456,983</b>	<b>\$622,488</b>	<b>\$330,714</b>	<b>\$291,774</b>
<b>2017-2019 Biennium</b>					
Capacity Support for HBWI	218-8202-15847	\$384,925	\$96,500	\$49,000	\$47,500





Hotchkiss Ranch Automated Flood-irrigation Infrastructure Imp	218-8202-16168	\$107,890	\$31,527	\$4,428	\$27,099
Sweek Dam Replacement Installation	218-8202-16171	\$408,914	\$102,229	\$2,460	\$99,769
Technical Support for Ongoing Projects & Baseline Monitoring	218-8202-16160	\$36,190	\$30,555	\$27,555	\$3,000
King Dam Replacement Project-Survey and Design	218-8202-16170	\$69,198	\$18,968	\$1,968	\$17,000
Dunn Dam Replacement Project-Survey and Design	218-8202-16169	\$67,033	\$19,952	\$2,952	\$17,000
	<b>TOTAL</b>	<b>\$1,704,150</b>	<b>\$299,731</b>	<b>\$88,363</b>	<b>\$211,368</b>

Note: All projects listed in this table were implemented or were continuing to be implemented during the 2017-2019 biennium.



## Harney Basin Wetlands Initiative

2015-2017 Biennium

Partnership Lead	Project Name	Project Type	OWEB Grant Award	Leverage Funds	Status	Notes
Harney SWCD	Aquatic Health Basin-Wide Baseline	Monitoring	\$59,619	\$64,776	Active	
Harney Watershed Council	Silvies River Irrigation Diversion Structure Replacement 1-Tyler	Technical Assistance	\$61,276	\$16,218	Active	
Harney Watershed Council	Carp Biomass Threshold	Technical Assistance	\$100,996	\$28,098	Active	
High Desert Partnership	Capacity Support for HBWI	Capacity Building	\$153,890	\$28,098	Completed	
High Desert Partnership	HBWI Outreach	Outreach	\$54,541	\$85,000	Completed	
High Desert Partnership	Harney Basin EQIP Engineering Support	Technical Assistance	\$34,056	\$15,593	Completed	
High Desert Partnership	Carp Dynamics and Ecosystem Development	Technical Assistance	\$213,684	\$65,191	Active	
Wetlands Conservancy	Silvies Floodplain and Vegetation	Technical Assistance	\$79,541	\$19,548	Active	
Harney Watershed Council	Silvier River Irrigation Diversion Structure Replacement 1 -Tyler Implementation	Restoration	\$295,009	\$82,042	Active	
High Desert Partnership	Survey and Design for Sweek Dam Replacement Irrigation Diversion Structure	Technical Assistance	\$66,971	\$20,131	Active	
Harney Watershed Council	Silver Creek Sub-basin Lidar	Technical Assistance	\$320,004	\$227,461	Active	
High Desert Partnership	Predictive Model for Light in Malheur Lake as a Function of Meteorology and Aquatic Vegetation	Technical Assistance	\$170,794	\$43,473	Active	
High Desert Partnership	Malheur Lake Restoration Alternatives Summit and Feasibility Analyses	Technical Assistance	\$102,404	\$25,968	Active	
High Desert Partnership	HBWI Biennium 2 Stakeholder Engagement	Stakeholder Engagement	\$50,961	\$45,800	Active	
			<b>Total</b>	<b>\$1,763,746</b>	<b>\$767,397</b>	
			Total Award	\$1,780,000		
			Balance	\$16,254		

Table 9

## Harney Basin Wetlands Initiative

2017-2019 Biennium

Partnership Lead	Project Name	Project Type	OWEB Grant Award	Leverage Funds	Status	Notes
High Desert Partnership	Capacity Support for HBWI	Capacity Building	\$384,925	\$96,500	Active	
High Desert Partnership	Hotchkiss Ranch Automated Flood-irrigation Infrastructure Imp	Restoration	\$107,890	\$31,527	Pending	Application with applicant for edits.
Harney County Watershed Council	Sweek Dam Replacement Installation	Restoration	\$408,914	\$102,229	Pending	Application with applicant for edits to include fish passage structure.
High Desert Partnership	Technical Support for Ongoing Projects & Baseline Monitoring	Technical Assistance	\$36,190	\$30,555	Active	
Harney County Watershed Council	King Dam Replacement Project-Survey and Design	Technical Assistance	\$69,198	\$18,968	Pending	Director Funding Award Complete
Harney County Watershed Council	Dunn Dam Replacement Project-Survey and Design	Technical Assistance	\$67,033	\$19,952	Pending	Director Funding Award Complete
The Wetlands Conservancy	Wetland Plant Community Monitoring & Management	Monitoring	\$100,000	\$25,000	To Be Submitted	Proposed for Spring 2019.
High Desert Partnership	Carp Dynamics and Ecosystem Development	Technical Assistance	\$22,000	\$65,191	To Be Submitted	Proposed for Spring 2019.
High Desert Partnership	Nutrient Analysis of Malheur Lake	Technical Assistance	\$282,545	\$70,636	To Be Submitted	Proposed for Spring 2019.
High Desert Partnership	Fish Distribution of Harney Basin	Monitoring	\$234,723	\$58,680	To Be Submitted	Proposed for Spring 2019/may be utilize supplement FIP funding.
High Desert Partnership	Moon Reservoir Rotenone Treatment for Carp	Restoration	\$52,250	\$13,062	To Be Submitted	Proposed for Spring 2019.
Harney County Watershed Council	Fish Ladders Install	Restoration	\$204,332	\$51,083	To Be Submitted	Proposed for Spring 2018. Monetary admendments to previous wet meadow restoration grants, if supplemental FIP funds used for Fish Distribution project, will add \$100,000 more to this request.
<b>Total</b>			<b>\$1,970,000</b>	<b>\$583,383</b>		
Total Award			\$1,970,000			
Balance			\$0			

Table 10



## **OWEB Focused Investment Partnerships**

### **2017-2019 Biennial Reporting**

#### Written Reporting Questions

Name of Partnership:

[Oregon Model to Protect Sage-Grouse, All Counties](#)

Please address the following questions (*in five pages or fewer*):

- 1) How is your partnership making progress toward achieving its implementation objectives (outputs)? What factors (positive or negative) have impacted your ability to achieve your identified goals?

We are proud to report that we have been able to achieve and exceed our goals within the FIP partnership. The FIP initiative has met our expectations and we have been able to put many projects on the ground that will benefit sage-grouse, local economies and overall ecological health. Factors that impacted our ability to achieve our identified goals begin primarily with factors such as weather unpredictability, and short time frames for planning and contracting. Positive factors included having the flexibility within our budget, understanding OWEB advisors, and the fact that we had shovel-ready projects, with the CCAA Site Specific Plans in place.

Occasionally, the short time frame made it difficult to coordinate contractors, conduct bid tours and award contracts. Implementation of projects are sometimes delayed by unpredictable weather conditions, lack of access to project sites, remote site locations, lack of pre-qualified contractors, or other unforeseen circumstances. Due to the long, dry Summer/ Fall, juniper pile burning was delayed. Actual project implementation, such as medusahead spraying, was also a challenge because of all factors listed above. In the end, projects fell into place and were able to be started or completed, with the exception of, juniper pile burning. These practices are getting underway at this time.

We were able to achieve many of our partnership's goals due to the flexibility with our FIP budget and the understanding, wonderful OWEB employees that we work with. In some cases, contractor bids came in lower than what was estimated in grant budgets so we were able to add more acres and/or conservation measures to projects to capture any leftover funds remaining in the actual project budgets. Also, by having completed CCAA Site Specific Plans, we had many projects that were ready for implementation due to the willingness of interested and participating landowners.

#### **All County Implementation progress:**

##### **Harney County:**

Harney County has implemented multiple years of juniper treatments, two years of medusahead spraying, fence marking, off stream water developments, and continues to install escape ramps. Specific project details are as follows:

**For site specific plan HC-08 (SSP HC-08)** – 1995 acres of juniper cutting was completed in 2017, and another 772 acres were cut in 2018.



**SSP HC-10** - The 972 acres of juniper were cut in 2017 which exceeded projected acres. In the Fall of 2017, 145 acres of medusahead were sprayed, in the Fall of 2018, 304 acres were sprayed. Medusahead spraying was coordinated with NRCS, therefore acreages changed per year. All juniper pile burning is currently underway.

**SSP HC-14** – Juniper cutting totaled 463 acres in 2017 and 333 in 2018. Medusahead was sprayed in 2017 on 144 acres and repeated on 10/18/18. 400 acres of pile burning is going to begin soon and 2 additional trough ramps will be ordered.

**SSP HC-16** – 791 acres of juniper cutting was completed on 9/2/17 and 309 acres of juniper were cut in 2018. Trough ramps were installed in 2 troughs in October of 2017. Recently completed: 2 off stream watering facilities/ spring developments. Associated troughs were equipped with wildlife escape ramps. 84 acres of pile burning has recently been completed and more are in the process.

**SSP HC-46** – In 2018, HC-46 converted 4 generator-powered well pump systems to solar powered systems. Each solar panel was equipped with an anti-landing strip to prevent predator birds from perching on the solar panels. 3 rubber tire troughs were placed and wildlife escape ramps were installed. 203 acres of juniper were cut, lopped and scattered and 31 acres were cut and hand piled.

**HC-55 SSP HC-55** - Juniper treatments have been completed on 1456 acres as of 4/12/17. The projected acreage was 1353, so we were able to complete 103 additional acres. A total of 1832 acres of medusahead were sprayed between the Fall of 2017 and 2018. Crane Union High School's "Mustang Manufacturing" was contracted and completed 4.2 miles (4 miles was estimated) of fence marking on 5/17/17, and built 8 trough ramps that were installed by the landowner on 11/27/17.

**SSP HC-69** – In 2017 444 acres of juniper were cut using the lop and scatter method. Additional acres were completed by NRCS as part of the HC-69 SSP. Conservation measures, including fence marking, trough ramps and juniper cutting on this property are complete and the acreages have shifted to State A sage-grouse habitat.

### **Lake County:**

The **Twelvemile Creek Sage Grouse Habitat Conservation grant** includes a variety of conservation measures including ~1,404 acres of Phase I and Phase II juniper removal and 139.3 acres decadent bitterbrush treatment that will help restore several thousand contiguous acres of sage grouse habitat in the Warner PAC. Approximately 7,930 feet of fence construction and 2 spring developments and 1 well completion project will improve livestock dispersment and utilization near riparian zones and critical sage grouse brood rearing habitats. Four wildlife escape ramps and ~46,992 feet of fence marking will help reduce the risk of wildlife drowning in water troughs and mortality by collision with fences. Juniper and bitterbrush cutting/piling has been completed, as well as all fence construction and fence marking. The well completion project has also been completed and equipped with two troughs and wildlife escape ramps. The remaining items within the grant will occur in the spring once ground and weather conditions have improved.

### **Malheur County:**

**Grant 216-8203-12971 Juniper Mountain Off-stream Water** includes 1 spring development to gravity feed water to six 1,000-gallon water troughs via 10,000 feet of 2-inch diameter pipe. These troughs will serve six pastures; each trough will have a wildlife escape ramp. The spring produces about 15 gallons per minute (gpm) measured during a sustained drought. The project will also include



one 6,000-gallon storage tank to ensure 3-day supply of water for 120 pairs and wildlife drinking water. Fence for this project will include 20,258 feet of wildlife friendly fence to create a 140-acre riparian pasture along 1.6 miles of creek and to prevent uncontrolled grazing in the riparian area. To enhance riparian and wet meadow vegetation (inside of the fence), the area (140 acres) will be seeded by a range drill with a mixture of native and introduced grass species at a rate of 16 pounds per acre. There will be about 2,000 linear feet, (1,000 feet of creek x 2 to account for both banks) of willows, dogwood and aspen planted with cage protection.

**Grant 216-8203-12973 In the Shadow of Ironside** includes 2 separate landowners. The first contains juniper removal on 3,001 acres consisting of 1,701 acres of Phase I, 1,090 acres of Phase II, and 211 acres of Phase III. All acres will be cut with a chainsaw using the lop and scatter brush control method where applicable. The 211 acres of Phase III will be machine piled with cool season burning. There will be 500 acres of reseeding in the dense areas of tree removal with a seed mix of Crested, Siberian, Intermediate wheatgrasses, Idaho Fescue, burnet & alfalfa.

In the other portion of this application, the landowner will treat 400 acres of Medusahead by burning where needed (to remove the thatch layer), herbicide treatment (to prevent sprouting of the soil banked medusahead seed) , then replanting the 400 acres with a competitive seed mix of crested wheatgrass and forage kochia. The goal is to use a highly competitive mix of species to outcompete Medusahead. These two species are proven to have competitive abilities. Crested wheat will be applied at 15 pounds per acre, either broadcast or drilled depending on the microsite conditions. Kochia seeding will be about a 0.25 pound per acre by broadcast or aerial application.

**Grant 216-8203-12973 TA.** Malheur SWCD hired a full - time employee (GS-5) to write CCAA plans for landowners, and a seasonal employee was also hired to help with monitoring on CCAA plans that have already been enrolled.

**Grant 216-8203 Brogan Hill Thrill.** This project consists of four parts. The first and second part of the project includes two buck and pole riparian enclosures that total a mile of fence. One is  $\frac{3}{4}$  of a mile long and encompasses a large riparian area. The second is  $\frac{1}{4}$  of a mile long and will encompass a spring and existing spring box. Within the  $\frac{1}{4}$  mile enclosure is the 3<sup>rd</sup> part of the project. Located in the center will be a solar panel and pump that will supply water out of the already existing spring box to an already existing trough that is roughly 250 feet away uphill just outside of the enclosure. These enclosures will help bring the riparian areas back to a more natural state and will ensure that cattle do not disturb the area. The fourth part of the project is 200 acres of reseeding in a disturbed area of the property. This reseeding area was in the Kitten complex fire in 2014 and is now mostly annual invasive grasses. By reseeding the area with a broadcast spreader, we are hoping to out compete the annual grasses while keeping the sagebrush that is still present.

#### **Watering Juniper: 218-8203-16157**

- Juniper Cut- (320 acres) 35 acres of Heavy, 260 acres of Medium, and 25 acres of Light
- Spraying 15 acres of invasive vegetation
- 6 water developments including (10 troughs, 10 bird ladders, and 10,000 gallons of water storage)
- 2 riparian acres enclosed with 2,623ft wildlife friendly fencing
- 3,618 ft of cross fencing



-6,241 ft of anti-collision fence markers

**Mill the Boulder: 218-8203-16158**

-Juniper cut of (234 acres) 172 acres of Heavy machine pile, 62 acres of Medium Lop and Scatter

-The slash will be used for erosion mitigation on the stream banks and for exclusion fencing of the fragile stream areas and aspen grove

-Seeding-Riparian Acres 23

-Seeding- Range mix Acres 211

**Cut Above the Rest: 218-8203-16159**

-Spraying 100 acres of invasive vegetation (2 applications)

-Juniper cutting (1093 acres) 62 acres of heavy machine piled, 372 acres of medium, 479 acres of light, and 180 acres of heavy done by hand.

-Seeding- (162 acres)

- 2) Describe how on-going and proposed monitoring activities will measure ecological progress? Is the partnership on a trajectory to measure ecological outcomes? What challenges and opportunities do you see in this work?

Monitoring is required as part of the CCAA's and are specified in each SSP. The SSP monitoring, and the FIP implementation monitoring requirements will adequately and thoroughly measure ecological outcomes of the conservation measures applied. The partnership is on a trajectory to measure ecological outcomes within a year's time because we chose Conservation Measures within our FIP that are measurable as part of our Strategic Action Plan. Moreover, we had landowner interest/participation within our FIP Focus Areas and we had shovel-ready projects due to the completion of CCAA Site Specific Plans. The challenges are coordinating contracts, weather unpredictability and balancing workload with many other responsibilities. The partnership has approached the opportunity to begin measuring ecological outcomes. At this point in time we have been able to have projects commence and the most visible outcomes are shown in before and after photos. The FIP TA grants also allowed SWCD's to hire additional staff to help implement projects and develop grants within a short amount of time.

- 3) How have the results chain and/or measuring progress tables informed your partnership's approach to prioritizing projects for implementation, tracking progress, and monitoring and/or adaptive management?

The results chain has guided our partnership, and the progress tables have been informative. Our projects are prioritized based on sage-grouse priority habitats and private lands within these areas. Conservation measures are determined within the development of SSP's. It has been helpful in guiding and tracking progress.





- 4) How has the partnership's Strategic Action Plan evolved and/or been modified during the biennium?

The partnership's Strategic Action Plan (SAP) has slightly evolved but has not been modified during the second biennium. Due to the amendment to the RCPP, our SAP has shifted slightly but our goals remain the same.

- 5) Beyond project implementation discussed in question 1, describe the challenges and successes that the partnership has encountered during the biennium. How has your partnership evolved as a result? What are the lessons learned through these experiences that will benefit the partnership in the future?

The partnership has experienced a variety of successes and challenges beyond project implementation. The partnership has continued to increase recognition and appreciation by private landowners for having the ability to obtain a financial and technical assistance program that could help assist them in implementing a variety of Conservation Measures that are a required component of their CCAA Site Specific Plans. Furthermore, the partnership experienced improved communication and unity amongst the members of the partnership. As a core group we have become stronger in problem solving across county jurisdictional boundaries with project implementation and design. The partnership is also better able to collaborate on conservation implementation practices and budget management. We have established fluidity of funds across county lines and have managed to avoid rigidity in fund division and allocation between counties. Another welcomed success was the increased interest by existing partners outside of the immediate partnership. Having the knowledge of our Oregon Model to Protect Sage-Grouse, All Counties FIP, partners were more willing and able to work with us to combine partner funds and work on larger, landscape scale projects, increasing the success of our FIP.

Aside from successes, the partnership also had challenges along the way. Initially, we faced an increase in workload and the pressure to work efficiently and effectively with a very short timeframe. Private landowners and SWCD Boards & staff felt pressure and angst to get projects/grants put together with very little time to put a lot of thought/planning into them. It is felt by the partnership that all projects should be fully researched with plenty of landowner meetings and site visits prior to submitting an application. Nevertheless, we were able to produce complete and carefully designed projects that were ready for implementation. Lastly, some members of the partnership experienced staff turnover. This challenge caused complications with project development, as we were working under very short timelines. The timing of losing staff members and acquiring new staff could not have been worse for those who were left to pick up where others left off. We have learned that we can overcome many challenges and OWEB has been very understanding and adaptive. We appreciate all of our partners as we work toward our goals.

As a partnership, and with OWEB we have learned how to set manageable time frames. We have smoothed out the process of signing agreements and beginning implementation. The main lesson learned is that it is important to have flexible implementation timelines and good communication.

- 6) Describe how your partnership has leveraged additional resources (direct and in-kind)?

Additional resources have been leveraged in the form of in-kind labor, training opportunities, transportation, and through direct solicitation for cost share dollars from our partners.

# Focused Investment Partnerships (FIP) Biennial Report, January 2019

## Sage Grouse - Oregon All Counties CCAA Steering Committee

2015-2017 Biennium

Partnership Lead	Project Name	Project Type	OWEB Grant Award	Leverage Funds	Status	Notes
Malheur SWCD	Juniper Mtn. Off-Stream Water	Restoration	\$124,938	\$40,588	Active	
Lakeview SWCD	Honey Creek Sage-Steppe	Restoration	\$232,806	\$366,896	Active	
Malheur SWCD	In the Shadow of Ironside	Restoration	\$445,144	\$173,092	Active	
Harney SWCD	Model to Protect Sage-Grouse Landscape CM Implementation	Restoration	\$846,918	\$504,958	Active	
Lakeview SWCD	North Warner Medusahead Control	Restoration	\$40,972	\$148,500	Active	
Malheur SWCD	TA Conservation Objective	Technical Assistance	\$55,623	\$16,992	Completed	
Malheur SWCD	Upper Cow Creek I	Restoration	\$0	\$0	Canceled	Request to "carry-forward" funds.
Malheur SWCD	Brogan Hill Thrill	Restoration	\$81,049	\$34,286	Active	
Harney SWCD	Model to Protect Sage-Grouse SSP Development	Technical Assistance	\$92,038	\$33,120	Active	
Harney SWCD	Otis Moffet Table Habitat Enhancement -BLM	Restoration	\$133,657	\$500,423	Active	
Malheur SWCD	II Rangeland Specialists	Technical Assistance	\$67,314	\$17,322	Active	
Malheur SWCD	Strutting Down the Runway	Restoration	\$40,032	\$12,362	Active	
Malheur SWCD	Hermes Helps the Romans	Restoration	\$147,283	TBD	To Be Submitted	Replace canceled project above, to be submitted spring 2019.
		<b>Total</b>	<b>\$2,307,774</b>	<b>\$1,848,539</b>		
		Total Award	\$2,307,774			\$11,836 moved from 218-8203 holding account. Brings total award from \$2,295,938 to \$2,307,774.
		Balance	\$0			

Table 1



## Sage Grouse - Oregon All Counties CCAA Steering Committee

2017-2019 Biennium

Partnership Lead	Project Name	Project Type	OWEB Grant Award	Leverage Funds	Status	Notes
Lakeview SWCD	Twelvemile Creek Sage-Grouse Habitat Conservation	Restoration	\$489,722	\$296,705	Active	
Harney SWCD	Model to Protect Sage-Grouse CM Implementation Phase II	Restoration	\$907,052	\$250,000	Active	
Malheur SWCD	Watering Juniper	Restoration	\$166,284	\$74,172	Active	
Malheur SWCD	Mill the Boulder	Restoration	\$117,136	\$50,856	Active	
Malheur SWCD	Cut Above the Rest	Restoration	\$243,873	\$98,115	Active	
Harney SWCD	Sage-Grouse FIP Monitoring	Monitoring	\$23,821	\$6,005	Pending	Director Funding Award Complete.
Harney SWCD	Proposed Medusahead Treatments	Restoration	\$125,882	TBD	To Be Submitted	Proposed for Spring 2019.
Malheur SWCD	Rangeland TA	Technical Assistance	\$77,186	TBD	To Be Submitted	Proposed for Spring 2019.
Malheur SWCD	Fencing Romans In	Restoration	\$70,000	TBD	To Be Submitted	Proposed for Spring 2019.
Malheur SWCD	Justice for the West	Restoration	\$90,000	TBD	To Be Submitted	Proposed for Spring 2019.
		<b>Total</b>	<b>\$2,310,956</b>	<b>\$775,853</b>		
		Total Award	\$2,343,414			\$11,836 moved to 216-8203 holding account. Brings total award from \$2,355,250 to \$2,343,414.
		Balance	\$32,458			

Table 2



## **OWEB Focused Investment Partnerships**

### **2017-2019 Biennial Reporting**

Name of Partnership: ***Ashland Forest All Lands Restoration Initiative***

#### **1) How is your partnership making progress toward achieving its implementation objectives (outputs)? What factors (positive or negative) have impacted your ability to achieve your identified goals?**

The partnership has enrolled 48 property owners with 2,723 acres into the program over Biennium (BN) 1 and 2. Our pace and scale have increased with 35 property owners and 1,653 acres recruited in BN2. Parcel size is decreasing as we finish the larger parcels and move to strategically connecting smaller parcels. Of the 1,653 BN2 acres recruited, we have completed the technical design, silvicultural prescriptions and layout for 1,050 acres and completed ecological thinning on 331 acres.

While landowner engagement, project design and layout, and ecological thinning are on schedule, completing pile burning and controlled underburning are continuing to be difficult to achieve due to dry weather and air quality restrictions on controlled burn smoke. Pile burning completes the treatment plan on each property and allows us to complete biennium billing and budget fulfillment. Because of this, we've had to swap BN2 thinning acres with BN1 pile burn acres to expend the BN1 budget.

Enabling factors for successes continue to be broad community support for ecologically based forest restoration and wildfire hazard reduction, additional neighbor-to-neighbor word-of-mouth recruitment, a high functioning partnership, and a solid foundation of technical and workforce capacity.

Lomakatsi maintains a highly skilled technical team, including a Lead Forester and a 10-person restoration workforce, which is vital to designing, explaining, planning, implementing and monitoring often complicated and nuanced ecological objectives for a site. At one level, the success of landscape-scale restoration and broad social engagement comes down to ongoing training and workforce development provided by Lomakatsi for all crew members. Recruitment, mentorship, and training have increased Lomakatsi's technical capacity. Training across the technical team builds the capacity of individual members to engage with landowners and deliver the full spectrum of technical duties. This capacity gives the partnership the ability to work simultaneously with more landowners and site-specific restoration plans.

Technical review by supervisors and partners ensures the quality of treatments and provides a framework for feedback and integration of adaptive management and learning within the organization and with partners. From prescription development to tree marking, each treatment is thoughtfully designed to meet ecological objectives, to restore resilient forest conditions by reducing overly dense stand conditions, relieve encroachment and stress on current and developing legacy trees, promote tree species diversity and



desired structure, reduce the risk of uncharacteristically severe fire, and promote wildlife habitat.

Capacity for landowner engagement is becoming more important as the parcel size of newly recruited properties decreases. Regardless of size, each parcel requires much of the same time commitment engaging with the landowner. Lomakatsi's technical capacity will be increasingly called upon in BN3.

Contractors also remain an essential part of accomplishing work, and Lomakatsi has been using collaborative peer-to-peer, on-the-job training to improve technical capability of three local businesses to implement these complex ecological restoration prescriptions. This allows the partnership to confidently subcontract, supporting an additional 40 jobs, which also builds and supports the regional restoration workforce.

Growing both technical and workforce capacity has created a solid foundation for continued success of the program while growing the pool of workers set to increase the regional pace and scale of restoration and fuels reduction.

**2) Describe how on-going and proposed monitoring activities will measure ecological progress? Is the partnership on a trajectory to measure ecological outcomes? What challenges and opportunities do you see in this work?**

*Tree density and vitality:* Across all treated units, thinning reduced tree densities by 163 trees per acre and 17 ft<sup>2</sup>/ac of basal area. By thinning small trees, treatments increased average quadratic mean diameter ("diameter") by 1.3 inches on average, a shift necessary to increase the fire resistance of remaining trees. The largest increases in diameter were achieved in stands with more conifers and dense understory trees, while oak dominated units with smaller diameter trees experienced only minor increases. Underburns in general did not significantly change trees per acre, basal area, or diameter. However, mortality of small trees in one underburn helped reduce trees density by 65 trees per acre. All results followed predicted trends and show progress toward accomplishing our FIP goals.

*Modeled fire behavior:* Treatments significantly reduced modeled wildfire behavior and increased canopy base height, a measure related to crown fire initiation and post-fire tree survival. Completion of the full suite of thinning and prescribed burning yielded the best results (Table 1). This outcome changes conditions to those that both facilitate controlled underburning and wildfire suppression. Canopy cover of the mid-story (plants shorter than 16.4 feet), or ladder fuels, was significantly reduced with minimal, though significant, reduction in overall canopy closure. These results show that the primary ecological effects are on the smallest trees and shrubs. Leaving the overstory intact reduces solar exposure to the forest floor, ameliorating understory fuel development, but comes with a tradeoff



with restoring species adapted to open forest conditions and long-term viability due to the worsening effects of drought.

**Table 1:** Units monitored with OWEB funding in Biennium I. Units were either treated with non-commercial surface and ladder fuel treatments in 2017 and 2018 or where thinned previously, then underburned in 2017. Values are area weighted mean (standard error). Flame length was derived from Scott & Burgan (2005) fuel models parameterized by relevant burn-plan prescription ranges, recent local fuels and fire-weather data, and consultation with federal fire staff; herbaceous and woody live fuel moisture was held constant at 60% and 90% respectively. Canopy base height, canopy cover, and canopy closure shown are field measured.

	<u>Mechanical Thin</u>		<u>Underburn</u>	
<b>Treatment Units</b>	6		5	
<b>Total Plots</b>	38		25	
<b>Acres monitored</b>	118		112	
<b>Timeline</b>	<b>Initial</b>	<b>Post</b>	<b>Initial</b>	<b>Post</b>
<b>Wildfire Flame Length (ft)*</b>	12.2 (2.1)	7.6 (2.2)	4.8 (1.1)	1.4 (0.4)
<b>Prescribed Fire Flame Length (ft)**</b>	4.1 (0.6)	2.6 (0.8)	1.7 (0.5)	0.5 (0.1)
<b>Canopy Base Height (ft)</b>	4.5 (1.6)	10.7 (2.6)	17.9 (4.4)	24.6 (5.6)
<b>Canopy Cover (% &lt;16.4 ft)</b>	31.8 (5.2)	10.9 (3.4)	8.8 (3.4)	3.0 (1.0)
<b>Canopy Closure (% all vegetation)</b>	72.5 (7.1)	65.3 (7.6)	73.3 (7)	68.7 (8.2)
<b>Encroached Legacy Trees (%)</b>	96	63	100	100

\*Wildfire conditions, very low dry fuel moisture (1-hour fuels = 3% moisture content, 10-hour = 4%, 100-hour = 5%) and 14 mph mid-flame winds

\*\*Prescribed burn conditions, high dead fuel moisture (1-hour fuels = 12% moisture content, 10-hour = 13%, 100-hour = 14%) and 5 mph mid-flame winds

*Legacy tree release and vigor:* A key ecological outcome of OWEB-funded work is to reduce competitive stress for legacy trees (trees >150 years old). Monitoring shows that encroaching vegetation was completely removed around 35% of legacy trees, with partial removal completed on a vast majority of legacies in treated units (larger conifers were left). Monitoring, with partners Southern Oregon University ([report here](#)) and Reed College ([poster here](#)), measured 5-year legacy tree responses to treatment within the Federal footprint of AFARI. Initial results found that legacy trees have not yet responded with anticipated increased vigor. Southern Oregon University monitoring suggests that restoration may be best directed at black oaks with greater than 30% of crown intact, while black oaks with greater dieback may not respond to treatments intended to improve their vigor.

*Monitoring trajectory:* Data to date show that monitoring is sufficient to characterize ecological outcomes at the treatment-unit scale (see standard errors in Table 1). These treatment-scale results suggest that we are on track to achieve our wildfire risk reduction



and some legacy tree release objectives. Retention of the largest trees suggests that we are accelerating development of late successional ecological structures (large trees) but not necessarily treating with sufficient intensity to increase legacy tree vigor and survival.

Landscape-level shifts in wildfire risk and proportions of seral states will be evaluated after project completion and our stand-scale data are sufficient to drive those analyses. These data and analyses will be useful for communicating treatment outcomes and informing development of future projects. [Photo monitoring](#) is useful to tell the story of treatment outcomes and facilitate outreach and engagement.

*Adaptive Management:* A chief challenge indicated by monitoring results to date, is implementing sufficiently intense treatments that transition stands to more open habitats and release legacy trees from stand-scale competition. There may be an opportunity to implement more thorough treatments as the project develops.

**3) How have the results chain and/or measuring progress tables informed your partnership's approach to prioritizing projects for implementation, tracking progress, and monitoring and/or adaptive management?**

Reviewing results chains with project partners has facilitated monitoring refinement and future project development. Results chains have not been used explicitly to track progress or drive adaptive management, though this is a potential growth opportunity for the AFARI Partners and supporters. This reflects the utility of a results chains for strategic planning, and the fact that units had been selected for implementation prior to completion of the AFARI results chain.

Through review of results chains, the AFARI monitoring partners prioritized supplemental monitoring of social outcomes and ecosystem services. This resulted in an OWEB supplemental monitoring proposal to: 1) Evaluate AFARI outreach and engagement effectiveness at increasing social support for upland forest restoration in Ashland and the Rogue Basin, 2) Quantify hydrological changes associated with forest restoration in AFARI footprint, 3) Quantify the ecosystem services of water production and carbon storage under climate change scenarios, and 4) Map and report on post-treatment tactical fire management opportunities within AFARI boundaries.

**4) How has the partnership's Strategic Action Plan evolved and/or been modified during the biennium?**

The AFARI strategic action plan has not changed, however, the way we meet objectives changed slightly to meet seasonal challenges caused by smoke management constraints and the need to get priority burning completed in the same year for key properties to avoid



leaving burn piles during summer fire season, and to minimize swapping acres between biennia. Also, after developing the results chain, we stepped up strategies to meet goals and objectives for introduction of fire. Finally, we worked on significantly more public land acres than originally planned, in part due to a \$1 million award from the U.S. Forest Service State and Private Forestry division that is earmarked for non-federal land (see below).

- Swamper burning (cutting and burning simultaneously) was used for a large project to reduce the amount of fuel carried over during the summer months on properties with homes near the city.
- Increased communication with public on controlled burning helped meet challenges with completing operations close to town. Community engagement also benefits goals in the results chain and the strategic action plan to restore low severity fire as a key ecological process on 2,000 acres. An emphasis on outreach with landowners and community supports these goals.
- After one year of implementation, an investment of over \$1 million was made by the USDA Forest Service's State and Private Forestry program through The Nature Conservancy. Funding flexibility allowed for a greater investment toward completing the AFR project footprint in the City's watershed on federal lands.

**5) Beyond project implementation discussed in question 1, describe the challenges and successes that the partnership has encountered during the biennium. How has your partnership evolved as a result? What are the lessons learned through these experiences that will benefit the partnership in the future?**

A major success for the project in Biennium II is the strengthening of engagement with local landowners, increased partner communication and outreach with citizens on controlled burning and smoke.

*Strengthened Partnership:* Partners designed the landowner intake process, community engagement, and planning for implementation and monitoring to co-align individual partner roles with the overall project objectives. Increased partner communication under the OWEB-FIP resulted in more successful implementation, planning, and monitoring.

- Identify individual partner strengths and assign roles and responsibilities.
- Set goals and objectives where each partner can cross participate in planning and execution of projects.

*Landowner Engagement:* Aligning objectives for the project with landowner needs remains a challenge. Through a review process with landowners, foresters with Lomakatsi Restoration Project strike a balance between project objectives and respecting landowner site specific considerations. Partners also learned that communication with landowners is critical to ensure they understand the timeline for



work completion because the process can take many months before implementation is completed.

- Periodic updates reduce confusion and establish expectations for the timeframe.
- Develop a process-based intake program for landowners to manage documentation requirements, data collection and organize seasonal timeframes.

*Community Engaged:* During operations for controlled burn and thinning operations, partners communicate daily. Notifications are pushed out in multiple media outlets to the community with information on the location, estimated duration of the burn, and where smoke may be seen or smelled. Conditions are monitored through the day and another notification is sent if smoke is expected to enter town.

- Expanded partnerships with The Ashland Chamber of Commerce, Asante Community Hospital and Jackson County Health to help build a proactive culture around the use of fire and inevitable smoke from wildfires and controlled burns.
- Provide education on project benefits and address community health concerns.

Similar projects should engage the community by identifying needs around communication and outreach for smoke and grow community partnerships.

As we respond to challenges in community and landowner and partner engagement, one lesson we have learned is that more communication around forest restoration helps build a cohesive and process-based grants program, which positions partners to expand projects to a greater geography.

**6) Describe how your partnership has leveraged additional resources (direct and in-kind)?**

- **\$31,000:** A grant with The Fire Learning Network via The Nature Conservancy, helped expand public communication and outreach for the project. AFR Partners conducted health education around smoke from wildfires and controlled burning, general education and outreach in support of controlled burning to reduce fuels.
- **\$13,760:** As part of the required match, the Ashland Parks and Recreation Commission partnered John Muir School and Oregon State University Spring Break Volunteers to pull invasive species at Acid Castle Rocks, an OWEB-funded project site.
- **\$1,200,000:** A USDA, Forest Service State and Private Forestry Program investment, via The Nature Conservancy, leverages OWEB funding in BN1 to accomplish:
  - 734 acres of thinning on private lands
  - 95 acres of burning
  - Smoke Monitoring Camera and Community Outreach
  - TRES (Ashland Prescribed Fire Training Exchange)
  - Monitoring for Water Quality and Economic Impact



- **Southern Oregon University:** One capstone project was completed for two students, each committing about 100 hours for 200 total hours.
- **Reed College:** Two 10-week paid internships at \$5,800 each, plus 120 volunteer hours on those projects. Class participation in planting and monitoring sugar pines with 200 hours of volunteer time.



## Ashland Forest All-lands Restoration Initiative

2015-2017 Biennium

Partnership Lead	Project Name	Project Type	OWEB Grant Award	Leverage Funds	Status	Notes
Lomakatsi Restoration Project	Ashland Forest All Lands Restoration TA	Technical Assistance	\$407,511	\$139,475	Completed	
Lomakatsi Restoration Project	Ashland Forest All Lands Initiative	Monitoring	\$98,858	\$29,443	Active	
City of Ashland	Ashland Forest All Lands Implementation	Restoration	\$1,153,430	\$1,989,844	Completed	
<b>Total</b>			<b>\$1,659,799</b>	<b>\$2,158,762</b>		
Total Award			\$1,660,000			
Balance			\$201			

Table 5

## Ashland Forest All-lands Restoration Initiative

2017-2019 Biennium

Partnership Lead	Project Name	Project Type	OWEB Grant Award	Leverage Funds	Status	Notes
Lomakatsi Restoration Project	Ashland Forest All Lands Restoration TA	Technical Assistance	\$449,778	\$128,112	Active	
City of Ashland	Ashland Forest All Lands Restoration	Restoration	\$1,780,680	\$3,156,000	Active	
Lomakatsi Restoration Project	Ashland Forest All Lands Implementation-Monitoring	Monitoring	\$109,542	\$38,685	Active	
<b>Total</b>			<b>\$2,340,000</b>	<b>\$3,322,797</b>		
Total Award			\$2,340,000			
Balance			\$0			

Table 6



# Oregon

Kate Brown, Governor

## Oregon Watershed Enhancement Board

775 Summer Street NE, Suite 360

Salem, OR 97301-1290

(503) 986-0178

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[www.oregon.gov/OWEB](http://www.oregon.gov/OWEB)



*Agenda Item L supports OWEB's Strategic Plan priority # 7: Bold and innovative actions to achieve health in Oregon's watersheds.*

## MEMORANDUM

**TO:** Oregon Watershed Enhancement Board  
**FROM:** Eric Williams, Grant Program Manager  
**SUBJECT:** Agenda Item L – Land Acquisition Conveyance  
January 15-16, 2019 Board Meeting

### I. Introduction

OWEB's land acquisition administrative rules require board approval of subsequent conveyances of property acquired with OWEB grant funds. This is an informational item about a pending conveyance of the Keystone property (formerly the "Kahn Tract," OWEB grant #205-011), which was acquired by Wild Rivers Land Trust (WRLT), which was the Elk River Land Trust, with OWEB funds.

### II. Background

The 163-acre Keystone property (Attachment A) was acquired in 2005 with \$212,000 in OWEB funds to permanently protect critical habitat along the Elk River in Curry County. The property connects to inventoried roadless and wilderness areas in the Rogue River Siskiyou National Forest. The Keystone property is bordered on three sides by the Grassy Knob Inventoried Roadless Area (IRA), and is adjacent to the Becker parcel, which includes late successional forest and 1,000 feet of frontage on the Elk River.

Due to the attributes of the Becker parcel, the U.S. Forest Service (USFS) is interested in acquiring the Becker parcel to add to the Grassy Knob IRA. However, USFS can only acquire properties contiguous to current national boundaries. In this case, given the similar attributes of the Keystone property (which is located between Grassy Knob and the Becker parcel), the USFS is interested in acquiring both parcels which will meet the requirements for contiguous properties.

As noted in the attached letters from WRLT (Attachment B) and USFS (Attachment C), the USFS cannot acquire a property encumbered by a conservation easement. Therefore, board approval of the conveyance would include relinquishing the OWEB conservation easement.

### III. Review of Proposed Conveyance

Per ORS 541.960, the board may approve, approve with conditions, or deny the sale or transfer of land. The board may require conditions to ensure consistency with the intent of the original grant, ensure the ability of the party receiving the land to carry out the obligations under the grant agreement, and to address the disposition of proceeds. If

the easement is relinquished, the board can outline provisions for repayment, with interest, of any grant funds. The board may not allow a sale or transfer that results in profit to any person.

To determine whether the transfer is consistent with the OWEB grant, staff asked the USFS to confirm its intent to manage the property consistent with the IRA designation, which is protective of the habitat for which the initial OWEB investment was intended. See the USFS letter in Attachment C.

As noted above, the board can outline provisions for repayment, with interest, of any grant funds. At the January board meeting, staff will discuss an option for how funds could be invested, should the board move forward with approval of the transfer. Staff recommend the proceeds realized by WRLT be returned to OWEB for subsequent investment in supplemental habitat projects in the Elk River watershed.

In order to proceed, the WRLT must expend significant resources on due diligence, particularly the appraisal costs, and would like to have a sense of the board regarding the potential request to approve a subsequent conveyance.

#### **IV. Recommendation**

This is an information item only. Discussion, questions, and other feedback from the board will help inform WRLT and USFS as they consider next steps in this transaction. Any formal board action on this item will be considered at a future meeting.

#### **Attachments**

- A. Map
- B. WRLT letter
- C. USFS letter



# Becker/Keystone Parcels Rogue River Siskiyou NF Curry County, OR

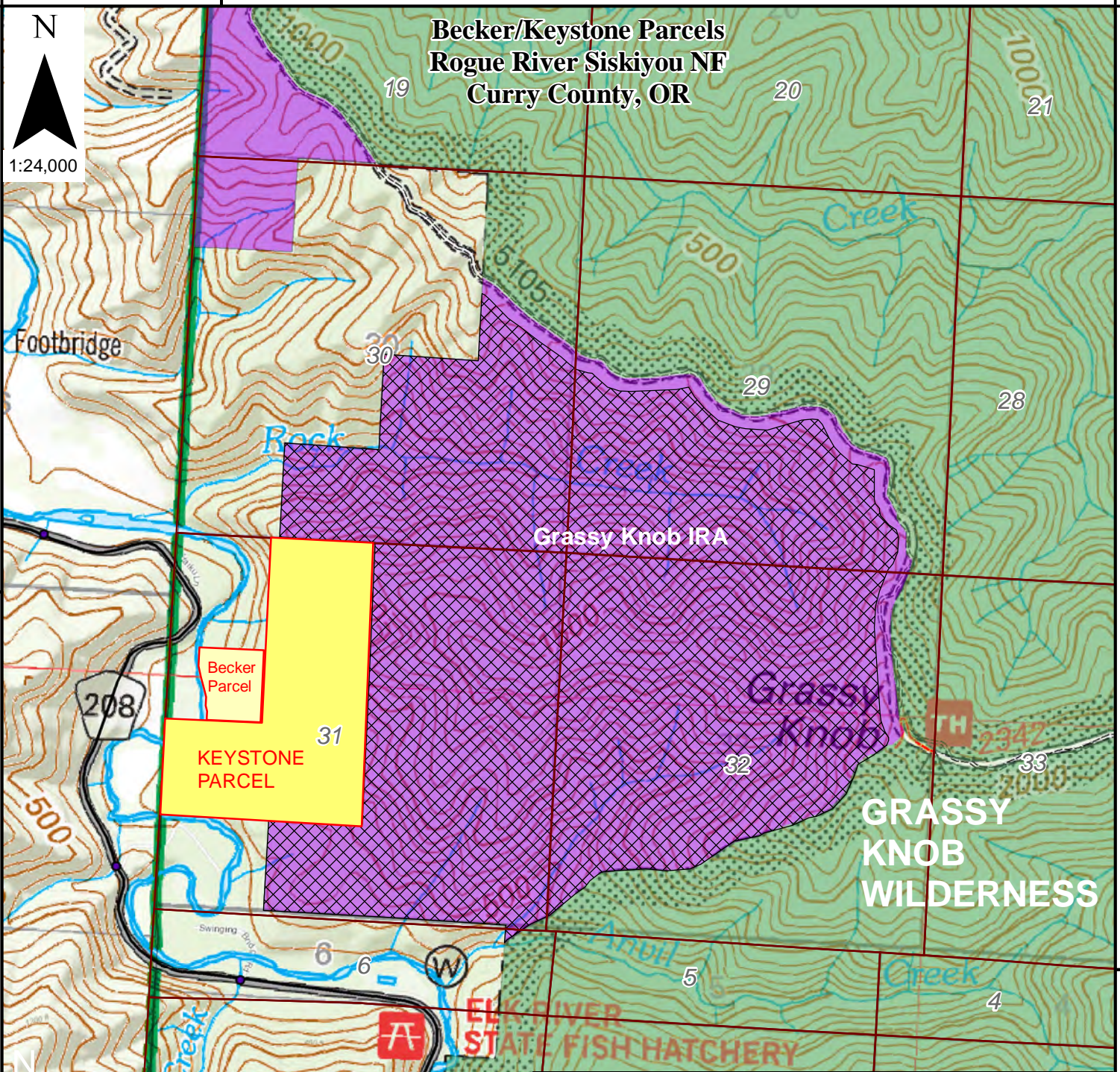


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







Becker Parcel  
KEYSTONE PARCEL

Grassy Knob IRA

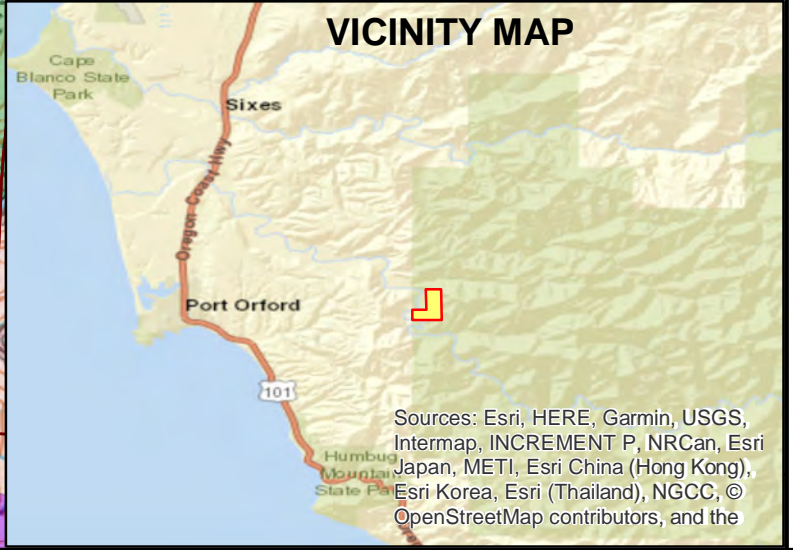
GRASSY KNOB WILDERNESS

ELK RIVER STATE FISH HATCHERY

### Legend

-  Becker Parcel
-  Keystone Parcel
-  Inventoried Roadless Area
- LRMP Management Areas**
- NAME**
-  Late Successional Reserves
-  Scenic/Recreation River
-  Riparian Reserve
-  Wilderness
-  Private Land

### VICINITY MAP



Sources: Esri, HERE, Garmin, USGS, Intermap, INCREMENT P, NRCAN, Esri Japan, METI, Esri China (Hong Kong), Esri Korea, Esri (Thailand), NGCC, © OpenStreetMap contributors, and the





## Wild Rivers Land Trust

*Protecting Natural Treasures and Working Lands on Oregon's Wild Rivers Coast*

December 2, 2018

Oregon Watershed Enhancement Board  
 Attn: Eric Williams, Grants Program Manager  
 775 Summer St. NE #360  
 Salem, OR 97301

Re: Keystone Property, Elk River Watershed, Port Orford

Board Members:

This letter is to describe the Wild Rivers Land Trust's (WRLT) rationale for seeking sale of its Keystone property in the Elk River Watershed to the United States Forest Service (USFS). Our decision to seek this sale is one we take very seriously, especially because sale to the USFS can only occur if the conservation easement on the property is extinguished. Extinguishing a conservation easement is a highly unusual step for us, and we only considered it because of the value of the ecological benefit to be gained in the process.

The Keystone property is surrounded on most of three sides by USFS "Inventoried Roadless Area," and on the fourth by a smaller property called Teaching Trees that fronts on Elk River. We will only enter into the sale of our Keystone property if the Teaching Trees property is purchased at the same time by the USFS. The ecological value of the Teaching Trees property is that it is a forested area with trees approaching the age they will be good Marbled Murrelet habitat, it has about 1,000' of Elk River frontage that is prime high-water floodplain providing high quality coho refuge. It also provides connectivity from the Grassy Knob Wilderness, the Inventoried Roadless Area and the Keystone property to Elk River. Finally, if purchased by the USFS, it provides valuable buffering for the Keystone property on the side not already protected by USFS Roadless Area.

The USFS has funds available for both these properties (WRLT's Keystone and the privately owned Teaching Trees holding), and is interested in purchasing both. The USFS cannot accept a property with a conservation easement on it, so the WRLT board has decided, after long and careful consideration, to move forward. Again, we do so because the ecological value gained by protecting the Teaching Trees property and the biological migration corridor from the upland Grassy Knob Wilderness Area all the way to Elk River, justifies removing the easement and selling to the USFS. The USFS cannot buy the Teaching Trees property without also buying the Keystone property, because they can only buy properties adjacent to USFS lands; Teaching Trees abuts USFS land if it is purchased along with the Keystone property.

We recognize that the USFS cannot give a permanent guarantee of how Keystone and the Teaching Trees properties will be managed, but the high value coho habitat, the potential for it being Marbled Murrelet habitat, the connectivity to the Wilderness and Inventoried Roadless Areas, and the fact that the Elk River watershed is designated a Key Watershed under the USFS management approach, all lend credence to the USFS' future management of this area for water quality, salmonid habitat, and other wildlife habitat values. We will work with OWEB to find an acceptable repayment or reinvestment strategy if the sale moves forward.

WRLT, Post Office Box 1158, Port Orford, OR 97465  
 541-366-2130 [www.wildriverslandtrust.org](http://www.wildriverslandtrust.org) [info@wildriverslandtrust.org](mailto:info@wildriverslandtrust.org)



## Wild Rivers Land Trust

*Protecting Natural Treasures and Working Lands on Oregon's Wild Rivers Coast*

We also recognize that if this transfer of both properties to the USFS does not go through, the Teaching Trees property is at imminent threat of private sale and likely logging, with significant damage to the ecological value of the land, the connectivity it provides, and to runoff and related damage to Elk River.

Finally, it is worth noting the USFS lands around the Keystone property are not Matrix lands, and were designated as Inventoried Roadless Areas (IRA) for the purpose of wildlife habitat enhancement. Transferring the two properties to the USFS opens the possibility of adding both to the IRA and Wilderness, which would increase the protection level for them.

Please contact us if you have questions or would like additional information.

Sincerely,

Ann Schmierer, Executive Director

A handwritten signature in cursive script, appearing to read "Ann Schmierer".

John Jones, Board Chair

A handwritten signature in cursive script, appearing to read "John M. Jones".



**File Code:** 5420  
**Date:** December 3, 2018

Grant Program Manager  
Oregon Watershed Enhancement Board  
775 Summer St NE, Suite 360  
Salem, OR 97301

Dear Mr. Williams:

The Forest Service is interested in acquiring a parcel of land owned by Wild Rivers Land Trust located in Section 31 of Township 32 South, Range 14 West, W.M, Tax Lot 200 in Curry County, Oregon. This parcel is encumbered by a conservation easement held by the Oregon Water Enhancement Board (OWEB). Acquiring this parcel would support the protection of habitat for threatened species (coho salmon, marbled murrelets, and northern spotted owls) and provide an opportunity to manage and conserve a Pacific Northwest salmon stronghold watershed.

Unfortunately, it is against Forest Service Policy to acquire land that is encumbered by a conservation easement. It is my understanding that OWEB would be willing to terminate this easement if certain requirements are met. One such requirement is to understand how the Forest Service would manage this land upon acquisition.

The parcel is located within the Rogue River-Siskiyou National Forest Boundary in an area designated Late Successional Reserve under the Northwest Forest Plan (which amended the 1990 Siskiyou National Forest Land and Resource Management Plan). Late-Successional Reserves are identified with an objective to, *“protect and enhance conditions of late successional and old-growth forest ecosystems, which serve as habitat for late-successional and old-growth forest related species including the northern spotted owl.”*

The parcel is also bordering the Grassy Knob Inventoried Roadless Area (IRA) on three sides. Construction, reconstruction, and timber harvest in inventoried roadless areas is prohibited in an IRA because they have the greatest likelihood of altering and fragmenting landscapes, resulting in immediate, long-term loss of roadless area values and characteristics.

Title 36 of the Code of Federal Regulations 254.3(f) states, *“... Lands acquired by exchange that are located within areas having an administrative designation established through the land management planning process shall automatically become part of the area within which they are located, without further action by the Forest Service, and shall be managed in accordance with the laws, rules, regulations, and land and resource management plan applicable to such area.”* This regulation is also stated in the Forest Service Roadless Area Conservation FEIS –Volume 1; November of 2000, page 3-248.



The Forest Service does not have the authority to make assurances regarding the future of National Forest System lands. However, the mission of the Forest Service is to sustain the health, diversity, and productivity of the Nation's forests and grasslands to meet the needs of present and future generations (<https://www.fs.fed.us/about-agency/what-we-believe>).

If you have any questions about the possible acquisition of this property, please contact Lisa Dilley, Realty Specialist, at [lldilley@fs.fed.us](mailto:lldilley@fs.fed.us) or by phone at 541-225-6316.

Sincerely,

A handwritten signature in blue ink, appearing to read 'Merv George Jr.', with a stylized, cursive script.

MERV GEORGE JR.  
Forest Supervisor

cc: Kathy Allen, Mary Wahl, John Jones, Ann Schmierer, Susan Beall





# Oregon

Kate Brown, Governor

## Oregon Watershed Enhancement Board

775 Summer Street NE, Suite 360

Salem, OR 97301-1290

(503) 986-0178

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[www.oregon.gov/OWEB](http://www.oregon.gov/OWEB)

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



## MEMORANDUM

**TO:** Oregon Watershed Enhancement Board

**FROM:** Eric Hartstein, Senior Policy Coordinator  
Andrew Dutterer, Partnerships Coordinator

**SUBJECT:** Agenda Item N – Implementation FIP 2017-2019 Action Items  
January 15-16, 2019 Board Meeting

### I. Introduction

This item includes requests pertaining to two separate Focused Investment Partnership (FIP) board actions:

- 1) Staff requests carry-forward on 2015-2017 biennium funds for current Implementation FIP initiatives.
- 2) The Deschutes Partnership requests a scope of initiative change.

### II. FIP Delegated Funds

Per OWEB's Delegated Funds policy, FIP funding allocated to a partnership's initiative at the start of a biennium has a limit of two years in which to be obligated in project grant agreements. Staff have observed that this two-year window is at times challenging for partnerships to meet for a variety of reasons, including: individual project conditions and/or demands shifting, delays in developing and/or implementing projects, and an increase in leverage funds covering a larger portion of project funding demand. Staff have most recently discovered that in cases where projects are finishing under budget, the balance of project funds are being held in the partnership's initiative account without the ability to access those funds given the expiration of the two-year limit.

Concurrent with the carry-forward request in this agenda item, OWEB staff are preparing to change the Delegated Funds policy to extend the funding window from two years to four years.

### III. Deschutes Partnership Scope of Initiative Change

The Deschutes Partnership requests to adjust the scope of their FIP initiative to include stream habitat restoration in the Crooked River basin. Currently, FIP funding is restricted to fish passage in the Crooked River basin. This request is based on two recent developments in the Crooked River basin which offer new restoration opportunities for the partnership. First, the Deschutes Land Trust recently purchased an ecologically significant property that encompasses the confluences of both McKay and Ochoco

Creeks with the mainstem Crooked River, just downstream of Prineville. Both creek tributaries offer historically important spawning and rearing habitat for spring Chinook and summer steelhead. Second, the Crooked River Watershed Council and basin partners recently received a Natural Resources Conservation Service Regional Conservation Partnership Program grant for \$6.5 million to pursue instream and riparian restoration in the lower Crooked River basin. The leverage funding opportunity is an excellent match for the FIP initiative. Attachment A is a memo submitted by the Deschutes Partnership that outlines the proposed scope of initiative change in greater detail.

#### **IV. Staff Recommendation**

Staff recommends the board carry-forward 2015-2017 biennium funding for each of the six current Implementation FIP partnerships to make any balance of funding available to the partnerships through the 2019-2021 biennium.

Staff recommends the board approve the proposed scope of initiative change for the Deschutes Partnership to pursue instream and riparian habitat improvement projects in the Crooked River basin.

#### **Attachments**

A. Deschutes Partnership Scope of Initiative Justification Memo

TO: Andrew Dutterer

FROM: Deschutes FIP Partners

DATE: November 30, 2018

RE: Inclusion of Crooked River Stream Habitat Restoration in Deschutes FIP

---

The Deschutes Focused Investment Partnership (FIP) respectfully requests the Oregon Watershed Enhancement Board to approve inclusion of Crooked River stream habitat restoration (Crooked River Restoration) in its FIP workplan beginning with the 2019-21 biennium.

Crooked River Restoration is included in our current Strategic Action Plan (SAP), but at the time we drafted the SAP we anticipated permitting these restoration actions over the next few years and implementing them beginning in 2022 (SAP, p. 18, Objective 2.3.2.1). The primary reason for delaying Crooked River Restoration until 2022 was that our initial focus for the Crooked River portion of the FIP was on funding and constructing fish passage at Opal Springs. Now that the Opal Springs project is funded and under construction (<http://www.deschutespartnership.org/accomplishments/crooked-river/opal-springs-fish-passage-project/>), we are able to consider additional opportunities to implement SAP objectives for the Crooked River.

One opportunity is restoring the Deschutes Land Trust's recently-acquired Ochoco Preserve, a property that includes Lower Crooked River frontage along with the confluences of the Lower Crooked River's two largest tributaries, Ochoco and McKay Creeks (<https://www.deschuteslandtrust.org/protected-lands/ochoco-preserve>). This project contemplates restoring up to two miles of stream habitat and as much as 120 acres of associated riparian and wetland habitat. The Land Trust and a large partner group are currently developing a conceptual restoration design, and the Deschutes Partnership has prioritized FIP funding for design and implementation in the 2019-21 biennium.

A second opportunity is the Crooked River Watershed Council's recent receipt of a \$6.5M NRCS Regional Conservation Partnership Program (RCPP) grant for the Lower Crooked River (<https://www.nrcs.usda.gov/wps/portal/nrcs/detail/or/programs/farmbill/rcpp/?cid=nrcseprd1377248>). The program's proposed activities include instream and riparian restoration, providing great match potential for the FIP. This program was established in 2018 and will continue through 2022. The Crooked River Watershed Council is developing projects now and will be ready to design and implement stream restoration actions during the 2019-21 biennium.

This request does not substantively change our FIP workplan or SAP, it simply advances the timing of Crooked River Restoration to take advantage of new projects and leverage opportunities. In addition, it will not displace other work — we've reviewed program needs for the upcoming biennium and concluded that Crooked River Restoration actions are both ripe and high-priority, our established measure for moving projects forward.



# Oregon

Kate Brown, Governor

## Oregon Watershed Enhancement Board

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*Agenda Item #O-1 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 O-1 – 2019-2021 Implementation FIP Selections  
January 15-16, 2019 Board Meeting

### I. Introduction

Staff request the board select Implementation FIP initiatives for the 2019-2021 biennium as recommended by the board's Focused Investments Subcommittee. 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.

Implementation FIP funding supports partnerships in pursuing conservation initiatives with up to \$12 million over 3 biennia. At the October 2018 meeting, the sense of the board was that they would be comfortable with \$6-\$10 million in funding for new FIP initiatives in the 2019-2021 biennium.

### **III. Solicitation and Review Process**

In February 2018, staff solicited for Implementation FIP initiatives. Partnerships were required to formally consult with staff prior to potentially submitting an application by June 29, 2018. Ten Implementation FIP applications were submitted by the June deadline, and covered all board-identified priorities except the Oregon Closed Lake Basin Wetland Habitat priority.

Initiatives were reviewed from July-September 2018 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 organized around the board-designated priorities. Evaluations were provided to applicants and posted on OWEB's website on October 18, 2018, and are found in Attachment B.

The Subcommittee on Focused Investments met at a public session on November 7-8, 2018 in Salem to interview representatives from each of the 10 Implementation FIP initiatives, and to make funding recommendations to the full board. After the initial interviews, the subcommittee conducted a preliminary ranking. Clear breaks were evident in this ranking, and subsequent deliberations were focused on the initiatives that were clustered in the middle of the rankings. The final subcommittee rankings and recommendations are found in Attachment C. The total funding recommendation for these initiatives is \$9,214,565. Attachment D displays how the recommended initiatives, along with current and future FIP initiatives, would fit into 25% of the board spending plan over the next several biennia.

At the January 15-16, 2019 meeting, the board will select new Implementation FIP initiatives for the 2019-2021 biennium. Contingent on funding available from the legislature, the selected initiatives would commence following board funding awards at the July 16-17 meeting.

### **IV. Recommendations**

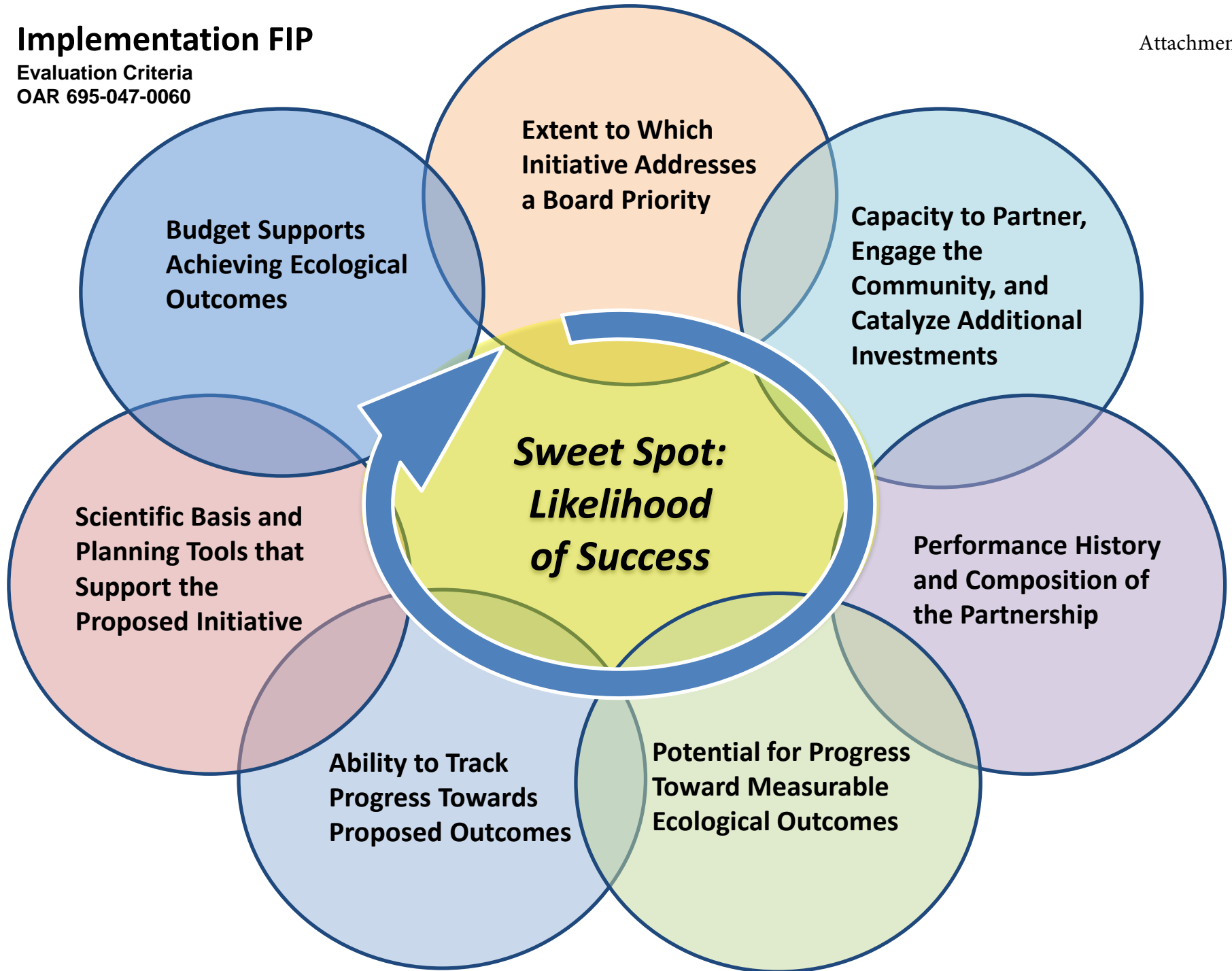
The Focused Investments Subcommittee recommends the board select the four gray-shaded FIP Implementation initiatives in Attachment C for the 2019-2021 biennium.

#### **Attachments**

- A. FIP Evaluation Criteria
- B. Evaluations: 2019-2021 Implementation FIP Initiatives
- C. Focused Investments Subcommittee Rankings & Recommendations
- D. Future FIP Funding Graph

# Implementation FIP

Evaluation Criteria  
OAR 695-047-0060



1. **Name of Initiative:** Baker Comprehensive Sage-grouse Threat Reduction
2. **Name of Partnership:** Baker Sage-grouse Local Implementation Team
3. **Application Number:** 220-8206-16481
4. **Initiative addresses the following Board-identified Priority(ies):** Sagebrush/Sage–Steppe Habitat

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

The Baker Sage-grouse Local Implementation Team’s (LIT) core partners are: Oregon Department of Fish and Wildlife (ODFW), Tri-County Cooperative Weed Management Area (Tri-County CWMA), Natural Resources Conservation Service (NRCS), US Fish and Wildlife Service (USFWS), Bureau of Land Management (BLM), Baker County, Powder Basin Watershed Council (PBWC), and private landowners. Our targeted ecological outcome is an increase in the quantity and quality of sage-grouse habitat and ultimately an increase in the Baker sage-grouse population. With FIP funding, we will implement several actions in our Comprehensive Sage-grouse Threat Reduction Plan (TRP): 1) treat invasive annual grass/noxious weeds; 2) augment understory vegetation; 3) enhance mesic habitat; 4) reduce anthropogenic subsidies to sage-grouse predators; and 5) remove juniper. FIP funding will fulfill capacity needs, support alternative grazing opportunities to promote treatment success, and address key information gaps. Our goals are directly aligned with the OWEB board-approved “Sagebrush/Sage-Steppe Habitat” priority because our: 1) geography is the Baker PAC and other sage-grouse “strongholds” within the Baker LIT Planning Area; 2) actions address the primary ecological threats to sagebrush habitats; and 3) TRP is designed to improve ecosystem function specifically for sage-grouse. Our approach embodies the implementation and monitoring vision of the Oregon Sage-grouse Action Plan.

6. **Budget Overview:**

<b>Funding Period</b>	<b>OWEB Funding Request</b>	<b>Estimated Match</b>
Biennium 1	\$1,714,566	\$2,422,496
Biennium 2	\$2,062,724	\$3,750,846
Biennium 3	\$2,347,620	\$2,395,584
<b>Total</b>	<b>\$6,124,910</b>	<b>\$8,568,926</b>



**7. Overall Initiative Rating: High (-)**

(see attached evaluation criteria review worksheet for details)

<b>Evaluation Criteria</b>	<b>Rating</b>
A) Extent to which initiative addresses a board priority	High (-)
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 measureable 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	High (-)

**8. Board Subcommittee Discussion Summary:**

- The partnership is diverse, and includes the right entities to address complex issues related to sage-grouse conservation in the Baker PAC.
- The proposed initiative will require the partnership to dramatically increase the amount of sage-grouse conservation in the county.
- There are enormous challenges associated with treating, and restoring, vast areas of invasive annual grasses; however, the partners are operating under the best available science to address the issue.
- The partnership has prioritized restoration actions in areas of strong sage-grouse breeding concentrations.
- Landowner commitment to sage-grouse conservation is critical in Baker County to ensure cross-boundary restoration, and it was encouraging that a landowner representative attended the subcommittee interview
- Continued Bureau of Land Management treatments on federal land are important to the success of this initiative.
- There are ongoing discussions of the correct entity to hold the Candidate Conservation Agreement with Assurances in Baker County.

**9. Board Subcommittee Ranking: 2 of 10****Attachment A: Initiative Map****Attachment B: Evaluation Criteria Ratings Worksheet**

## Figures

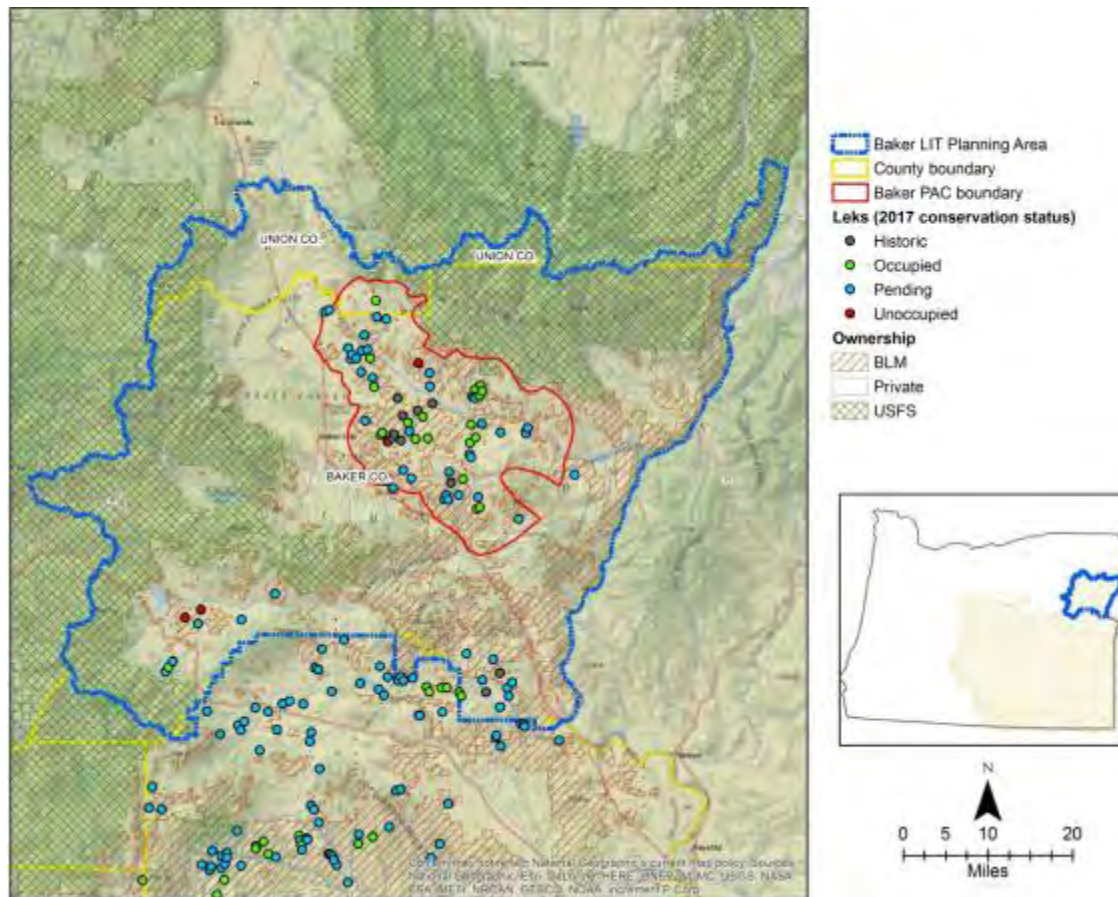


Figure 1. Baker LIT Planning Boundary, Priority Area for Conservation (PAC), leks, and land ownership. Lek conservation status is assigned annually<sup>3</sup>.

<sup>3</sup> Historic: Unoccupied prior to 1980 and remains so; Occupied: a regularly visited lek that has had  $\geq 1$  male counted  $\geq 1$  of the last 7 years; Pending: A lek not counted regularly in the last 7 years; Unoccupied: A lek that has been counted annually and has had 0 birds for  $\geq 8$  consecutive years; Unoccupied-pending : A lek not counted regularly in a 7-year period, but birds were not documented at last visit.

**FIP Priority Review:** Sagebrush/Sage-Steppe Habitat

**Name of Initiative:** Baker Comprehensive Sage-grouse Threat Reduction

**Name of Partnership:** Baker Sage-grouse Local Implementation Team

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## EVALUATION CRITERIA

### (a) The extent to which the initiative addresses a Board-identified priority

*Rating: High (-)*

#### STRENGTHS:

- The initiative is focused on the Priority Area for Conservation (PAC) and important connectivity corridors for sage-grouse in Baker County.
- The Strategic Action Plan and associated planning documents provide extensive details on implementing conservation actions in prioritized areas near sage-grouse leks.
- The initiative is seeking to treat invasive annual grasses at a landscape scale, which is a challenge that is directly tied to a key limiting factor identified in the Board-identified priority.
- The initiative will leverage other resources with similar goals and priorities (e.g., NRCS focal area).

#### CONCERNS:

- While invasive annual grasses are a critical ecological threat to the sagebrush ecosystem, successful treatments are challenging, and benefits may be slow to accrue.
- As the majority of the focus area is located on private land, success measured at a landscape scale depends on landowners signing up for voluntary programs, such as Candidate Conservation Agreements with Assurances (CCAAs).
- The Threat Reduction Plan identifies nearly 70,000 acres within the Baker PAC dominated by invasive annual grasses. The initiative proposes to address 25,000 acres of invasive annual grasses and other noxious weeds; it is unclear if this will be enough to tip the balance in the right direction for sage-grouse.

#### ADDITIONAL COMMENTS:

The Baker PAC is isolated, and sage-grouse populations are struggling. There are concerns that if one portion of the sage-grouse range is lost here, local adaptations may be lost, as well as the sage-grouse. The general sense is that there are still enough sage-grouse in the Baker PAC to sustain a viable population into the future if appropriate management is put into place.

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

*Rating: Medium (+)*

**STRENGTHS:**

- The partnership may currently be constrained by a lack of staff capacity and funding, but the partnership recognized this limitation and developed an approach to address the issue with their proposal.
- The partnership provides good details for both stakeholder engagement, and recruiting landowners.
- The partnership appears to be well-organized, with good governance documentation and a clear, well-thought out strategy to implement projects.

**CONCERNS:**

- There may be too heavy a reliance on one person as the partnership coordinator. It was unclear how other core partners will be involved in managing the partnership.
- While adding capacity was well-articulated as a limiting factor for the partnership, it is a large portion of the overall budget, which limits funds available for restoration.
- While leverage was noted in the proposal, the partnership did not make clear what the fundraising strategy was for the LIT.

**ADDITIONAL COMMENTS:**

The Tri-County Cooperative Weed Management Area is lead partner for implementation, and is supported by local, state and federal agencies and landowners through the Local Implementation Team (LIT).

**(c) The performance history and composition of the partnership**

*Rating: Medium*

**STRENGTHS:**

- The Threat Reduction Plan demonstrates that the partnership has clear goals, and the partnership has experience in successfully implementing projects that benefit sage-grouse.
- The process for soliciting and evaluating individual projects within the partnership is strong.
- The right partners are involved, all of which bring important strengths to the initiative. The partnership is also open to adding partners as appropriate and has a governance mechanism for doing so.

**CONCERNS:**

- While the decision making process for identifying and evaluating projects is strong, it is less clear how decisions related to partnership governance would be made.
- It is not clear how the partners will use capacity funding to manage and guide the partnership.

**ADDITIONAL COMMENTS:**

The partnership is part of larger sage-grouse conservation efforts across the western United States. The opportunity exists to communicate lessons learned to similar efforts over a large geography.

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

*Rating: Medium (+)*

**STRENGTHS:**

- The implementing bodies of the partnership are experienced in treating invasive annual grasses and other noxious weeds.
- A FIP in this area may leverage NRCS funding for weed treatments.
- If CCAA enrollment targets are met, the initiative will have a higher likelihood of success, as landowners will be engaged in the process for the life of the 30-year commitment.

**CONCERNS:**

- The primary concern is that progress is uncertain in successfully treating invasive annual grasses, and more discussion would be helpful on past treatment successes and lessons learned by the partners.
- More information about grazing impacts on federal land should have been included in the proposal. In addition, more specifics about how grazing will be used as a management tool across the landscape would have been helpful.
- There is some uncertainty if CCA/CCAA enrollment targets will be met, particularly if the holder of the programmatic CCAA is not known at this time.

**ADDITIONAL COMMENTS:**

The establishment of grass banks in the area would be a major accomplishment, and given the complexity in developing these tools, it is advised to make this a priority for the partnership.

**(e) The ability to track progress towards proposed outcomes***Rating: High***STRENGTHS:**

- The proposal includes detailed baseline information which can serve as a reference point to measure change over time.
- The proposal utilizes remote sensing and geospatial technology at different scales.
- The partnership will also be using the state and transition model which has been used in other landscape treatment efforts to conserve and restore sage-grouse habitat.
- The proposal provides good detail on project-level monitoring actions.

**CONCERNS:**

While useful, remote sensing alone is not an appropriate tool to reflect sage-grouse habitat suitability. Additional metrics and indicators are required, and more detail about this could have been better described in the proposal as it pertains to programmatic monitoring.

**ADDITIONAL COMMENTS:**

The development of a monitoring database should be coordinated with similar efforts currently underway through the Oregon Sage-Grouse Conservation Partnership.

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

- The proposal does a good job referencing, and building off of, all relevant conservation plans. These plans have guided the partnership in identifying restoration needs critical for sage-grouse.
- The implementation plan proposed by the partners is excellent.
- The ongoing study of raven predation of sage-grouse in Baker County will dovetail nicely with the timing of the initiative, as the results could be integrated into program implementation in 2019.

**CONCERNS:**

- The project level prioritization is good, but there are concerns that there are many high priority projects listed, and it may be difficult to prioritize between them.
- More discussion in the application could have been provided on treatment details (e.g., what actions have worked treating invasive annual grasses in Baker County and lessons learned that can be applied to 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 allocation of funds across grant types to be utilized by the partnership is appropriate for what they are intending to accomplish with FIP funding.
- The importance of investing in the right staff positions has been correctly identified by the partnership.

**CONCERNS:**

- Stakeholder engagement will be critical, and with a lot of work assigned to the LIT Coordinator, it may be difficult for the staff person to have the capacity required for effective communication.
- The allocation in the proposal budget and work plan between partnership capacity and stakeholder engagement could have been described more clearly.

**ADDITIONAL COMMENTS:**

The partnership intends to utilize OWEB funding to fully support an ODFW position to coordinate the LIT. OWEB funding cannot be used to solely support state or federal agency positions. If the LIT coordinator position is funded through a FIP award, the position must be sponsored by an eligible grantee.



1. **Name of Initiative:** Restoration for Native Fish Recovery
2. **Name of Partnership:** Clackamas Partnership
3. **Application Number:** 220-8207-16482
4. **Initiative addresses the following Board-identified Priority(ies):** Aquatic Habitat for Native Fish Species

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

The Clackamas Partnership Core Partners: The Clackamas River Basin Council, Greater Oregon City Watershed Council, North Clackamas Urban Watersheds Council, Johnson Creek Watershed Council, Clackamas Soil and Water Conservation District, Metro, US Forest Service (Mt Hood National Forest, Clackamas Ranger District), Confederated Tribes of Warm Springs, North Clackamas Parks & Recreation District, and Oregon Department of Fish and Wildlife. The Partnership's anticipated restoration outcomes are improved aquatic riparian/floodplain habitats and watershed processes. The Partnership's Initiative builds on the Lower Columbia River Conservation and recovery plan. The improved environmental baseline will enhance habitat quality and capacity for ESA-listed salmon, steelhead, and bull trout, and improve conditions for Pacific lamprey. The primary focus of the initiative is on improving aquatic and floodplain habitat complexity, including floodplain access for juvenile fish. Most of the geographic focus is on the mainstem and floodplain of the Clackamas and lower Willamette rivers because these areas support both the Clackamas ESA-listed Fish Population but also Willamette basin stocks. The implementation funding will support restoration projects, feasibility studies to identify future projects, implementation capacity, outreach, and monitoring.

6. **Budget Overview:**

<b>Funding Period</b>	<b>OWEB Funding Request</b>	<b>Estimated Match</b>
Biennium 1	\$3,454,580	\$5,023,215
Biennium 2	\$2,980,500	\$548,000
Biennium 3	\$2,309,000	\$1,753,000
<b>Total</b>	<b>\$8,744,080</b>	<b>\$7,324,215</b>

**7. Overall Initiative Rating: Medium (+)**

(see attached evaluation criteria review worksheet for details)









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

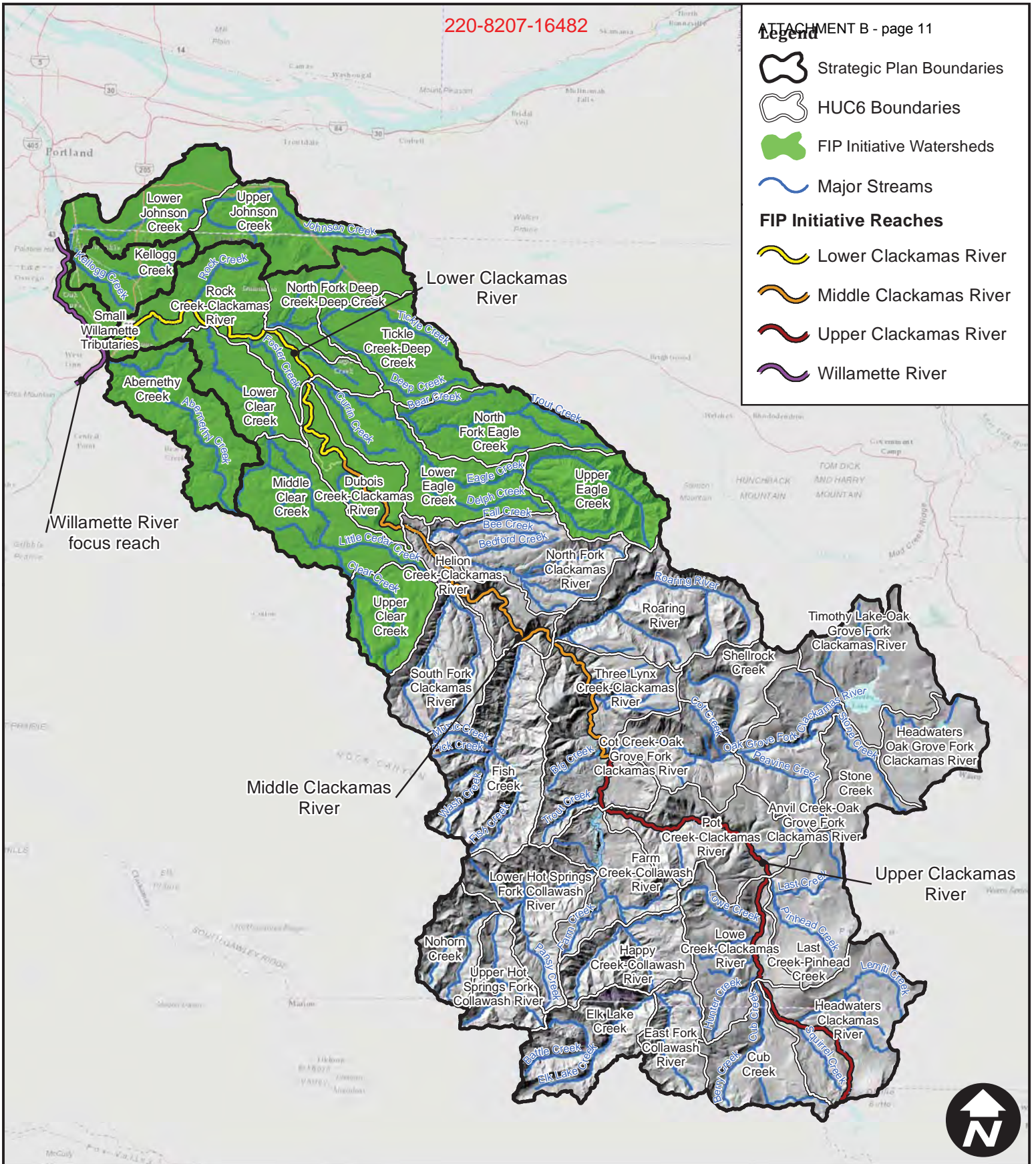
**8. Board Subcommittee Discussion Summary**

- The strategic action plan covers a large geography, but the proposed FIP initiative is focused on the lower mainstem Clackamas River. This focus provides the greatest restoration cost/benefit and increases resilience among numerous ESA-listed salmon/steelhead fish populations.
- The initiative addresses priority actions in the Lower Columbia River recovery plan: increasing and improving off-channel habitat and instream habitat complexity.
- This is not an urban proposal. The initiative encompasses a diversity of land-uses with a focus on the mainstem Clackamas, which is predominantly a rural river corridor. Proposed projects in urban settings provide access to critical habitat upstream.
- This is a high performing partnership with a track record of success.
- ODFW is a key partner and strong collaborator and will update the Lower Columbia River recovery plan in 2025 in coordination with the partnership.
- A strong outreach plan guides landowner and community engagement and clearly defines outreach roles among the partners.
- Pinniped predation is a threat in the basin, but is not directly connected to the scope of the proposal.
- The initiative is highly visible given its proximity to an urban center. A successful initiative would provide positive momentum for future restoration work in the basin.

**9. Board Subcommittee Ranking: 5 of 10.****Attachment A: Initiative Map****Attachment B: Evaluation Criteria Ratings Worksheet**

Legend

-  Strategic Plan Boundaries
-  HUC6 Boundaries
-  FIP Initiative Watersheds
-  Major Streams
- FIP Initiative Reaches**
-  Lower Clackamas River
-  Middle Clackamas River
-  Upper Clackamas River
-  Willamette River



Willamette River focus reach

Middle Clackamas River

Upper Clackamas River

Date: 4/5/2018

Scale: 1 inch = 7 miles

Data Source: ESRI, 2018; USGS, NHD, 2016

# Strategic Action Plan Geography and FIP Initiative Areas



# Clackamas Partnership

**FIP Priority Review:** Aquatic Habitat for Native Fish Species

**Name of Initiative:** Restoration for Native Fish Recovery

**Name of Partnership:** Clackamas Partnership

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## EVALUATION CRITERIA

### (a) The extent to which the initiative addresses a Board-identified priority

*Rating: High (-)*

#### STRENGTHS:

- The SAP and application align with the OWEB Aquatic Habitat for Native Fish Species Board-identified priority.
- The SAP was developed based on recovery plans.
- The partnership understands the general needs as described in relevant recovery plans, and has translated this well to the approach in the Clackamas basin.
- The geography is important for meeting Upper Willamette River and Lower Columbia River recovery goals.
- The proposed work in the mainstem Clackamas is important for recovery.

#### CONCERNS:

The rationale for selecting the specific geographies proposed in the FIP application, specifically the urban areas of Johnson and Kellogg Creeks, is not clearly described in the application. Although the concept of building population diversity and resilience is generally valid, the benefit of including these tributaries to achieving the stated ecological goals for the initiative is not clear from the application.

#### ADDITIONAL COMMENTS:

Including urban streams in the initiative geography, such as Johnson and Kellogg Creeks, provides funding for areas that are customarily challenging to attract funding.

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

*Rating: High (-)*

#### STRENGTHS:

- The partnership is well-structured to conduct stakeholder engagement. The application thoroughly describes how individual partners engage diverse audiences, including the greater community, landowners, and elected officials. The partnership has good knowledge of audiences to be reached throughout the basin.

- The partnership demonstrates thorough knowledge and insights regarding the benefits and leveraged resources individual partners will bring to the initiative. The application provides good examples of how the partnership will conduct stakeholder engagement and other activities related to partnership coordination and management.
- The partnership has outlined appropriate opportunities for leverage funding and has the capacity to successfully pursue these funding opportunities.
- The Project Tracker tool is highly advantageous for the partnership in organizing and prioritizing their restoration approach in the basin, as well as for stakeholder engagement.

**CONCERNS:**

The application describes an evaluation and ranking process in great detail, but it is difficult to decipher exactly how this will be applied in practice.

**ADDITIONAL COMMENTS:**

- The partnership has clear leadership in the Clackamas River Basin Council; however, the other partners' roles in managing the partnership were unclear.
- The partnership has a strong communication plan, but there was concern that the partnership hasn't allocated enough funding to implement the plan.

**(c) The performance history and composition of the partnership**

*Rating: Medium (+)*

**STRENGTHS:**

- The partnership consists of high performing partners, and includes all of the right partners for successful implementation of the initiative.
- The partners have a history of being supportive of one another in providing assistance and guidance to successfully implement projects.
- The application demonstrates a strong track record of working individually, while the Project Tracker illustrates how the partners are coordinated in pursuit of their larger vision.
- The partnership is structured appropriately for conducting conservation work in an urbanized area.

**CONCERNS:**

It is unclear whether the ecological actions proposed in the initiative are based on the highest priority actions or the scope and capacity of the individual partner organizations.

**ADDITIONAL COMMENTS:**

Some partners seem to be in more supporting roles and it is unclear what resources they are bringing to the partnership.

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

*Rating: Medium (+)*

**STRENGTHS:**

- The work plan is clear and is tied to recovery plan goals. The appropriate actions/outputs have been identified to support the initiative's ecological goals.
- The specific restoration actions and locations of those actions proposed in the application support recovery plan goals. The focus on the mainstem Clackamas is a strength of the restoration approach.
- The partners have successfully implemented similar restoration actions previously, including success in restoring alcove backwater channels.

**CONCERNS:**

- The FIP application and work plan are broad; it is difficult to connect the application goals across the variety of geographies in the application.
- Creating fish passage is an appropriate goal of the application; however, the application did not clearly articulate the number of miles that would be opened with the passage work or the quality of the habitat that would be made accessible.
- Deep, Eagle, and Clear Creeks, all tributaries to the mainstem Clackamas, are noted as the highest priority areas; however, the work plan includes only three projects in those streams. More attention should be focused on these streams in order to achieve the stated ecological goals of the initiative.

**ADDITIONAL COMMENTS:**

- Urban settings are complex locations for implementation of restoration actions; achieving measurable ecological outcomes could be difficult in the urban geographies.
- There are social and ecological benefits to completing restoration actions in urban setting.
- There is some uncertainty whether the proposed actions will be sufficient to achieve process-based restoration. Long-term ecological outcomes were not clearly articulated.
- The Clackamas River is a popular recreation river. The proposal does not describe how recreation activities and restoration actions will be compatible.

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

*Rating: Medium (+)*

**STRENGTHS:**

- Project Tracker, the program being used by the partnership, appears to be a great tool for tracking projects and progress toward implementation across multiple partners.
- Existing ODFW fish and habitat monitoring provides for baseline and future monitoring data. ODFW has also committed to doubling AQI habitat surveys under the FIP initiative.

- PGE's PIT tag monitoring at the dam provides important fish migration data.
- The application proposed significant efforts and resources towards macroinvertebrate monitoring. This approach is quantitative, engages the community, and helps tell the story of water quality and watershed health.

**CONCERNS:**

- It is unclear how the partners will link macroinvertebrate monitoring to fish recovery. Additionally, it is difficult to understand whether the macroinvertebrate studies will provide the necessary near-term indicators to know if the initiative is on the right trajectory and how the partners might adaptively manage their progress.
- The application did not clearly describe how juvenile fish will be monitored in the lower basin.
- The initiative could benefit from incorporating stronger water quality monitoring, both baseline and trends over time.

**ADDITIONAL COMMENTS:**

The partners have all of the relevant pieces to monitor progress from the project to the program level, but the application narrative did not clearly connect all of the dots concerning how the monitoring and analysis would articulate the story of progress of the initiative.

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

*Rating: Medium*

**STRENGTHS:**

- Project tracker is a strong planning tool, which features project summaries that are useful from a planning perspective.
- The restoration approach is supported by numerous recovery and other planning efforts.
- The application highlights temperature being a threat and addressing that threat with restoration projects.

**CONCERNS:**

- While the importance of population resilience in the context of climate change is discussed in the Lower Columbia River recovery plan, it is unclear from the application how initiative planning decisions incorporated consideration of climate change.
- The application lacks detail in the explanation of the methodology and rationale for identifying and prioritizing projects. The process as generally described appears to be sound, but it isn't clear how that process yields the priority projects.
- The proposed reach analysis on the mainstem Clackamas for planning biennium 2 and 3 projects may not be necessary given the significant research completed on the Clackamas over time.

**ADDITIONAL COMMENTS:**

The application includes discussion of three categories of land use development and assigns a category to proposed projects, which is a unique and important approach for restoration in a relatively urban area. However, it is not clear how the partnership prioritized projects based on those designations.

**(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 has successfully leveraged in-kind services and funds.
- PGE and Metro are active partners contributing funding.
- The capacity budget is appropriate for the initiative.
- The first biennium features clear costs for projects and match.

**CONCERNS:**

- The amount allocated to Stakeholder Engagement appears light relative to the work required and there is no match budgeted. This is particularly the case in an urban environment that requires important landowner relationships.
- The partnership may be underestimating the cost of monitoring, although there is match budgeted in each biennium.
- Technical Assistance is entirely lacking in biennia 2 and 3. It is unclear whether the \$250,000 budgeted in biennium 1 is sufficient to design all proposed projects.

**ADDITIONAL COMMENTS:**

None.



1. **Name of Initiative:** John Day Basin Native Fish Habitat Initiative
2. **Name of Partnership:** John Day Basin Partnership
3. **Application Number:** 220-8208-16483
4. **Initiative addresses the following Board-identified Priority(ies):** Aquatic Habitat for Native Fish Species

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

The John Day Partnership formed in 2014 from a diverse group of stakeholders; currently 28 organizations have signed onto the Memorandum of Understanding. Core partners include five SWCDs, four Watershed Councils, six federal agencies, three state agencies, three tribal governments, two conservation groups, two forest collaboratives, and one land trust. The 4 major ecological goals of the Partnership are: 1) Summer base flows met per the strategic action plan in high priority watersheds by 2030; 2) Water quality standards met per the John Day River Basin TMDL in high priority watersheds by 2030; 3) Passive and active habitat restoration implemented that addresses primary limiting factors and restores ridge-to-ridge ecosystem functions and processes in high priority watersheds by 2035; 4) Long-term trend of increasing fish populations per local, state, federal, and tribal plans by 2040. The partnership intends to use the implementation funding to meet these goals by implementing restoration actions identified in the BPA Atlas process to be of the highest priority. All of the restoration actions identified in the SAP will address one or more limiting factories identified in the Mid-C Recover Plan for Steelhead and align with the OWEB board-approved Focused Investment Aquatic Habitat for Native Fish Species Priority.

**6. Budget Overview:**

<b>Funding Period</b>	<b>OWEB Funding Request</b>	<b>Estimated Match</b>
Biennium 1	\$4,000,000	\$9,713,746
Biennium 2	\$4,000,000	\$7,789,866
Biennium 3	\$4,000,000	\$4,719,866
<b>Total</b>	<b>\$12,000,000</b>	<b>\$22,223,478</b>

**7. Overall Initiative Rating:** High (-)

(see attached evaluation criteria review worksheet for details)

<b>Evaluation Criteria</b>	<b>Rating</b>
A) Extent to which initiative addresses a board priority	Medium (+)
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 measureable 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 Subcommittee Discussion Summary:**

- This is a high performing, well-structured partnership that meets the vision of the FIP program.
- The partnership's interview responses were deep, comprehensive, and shared across all partners at the table.
- The partnership estimates that it is currently implementing \$9M in conservation projects in the basin. The addition of FIP funding would not require a significant ramping up. The proposed projects are ready to go; funding is the only limiting factor. The cost/benefit of the proposed initiative is strong.
- The Restoration Atlas is complete for the FIP initiative geography, and is a highly strategic, science-based restoration planning tool.
- The initiative builds on other investments in the basin, including BPA funding and three RCPP funded projects.
- A strong outreach plan guides landowner and community engagement and clearly defines outreach roles among the partners.
- The future of the CHaMP monitoring program is uncertain and the partners will have to adapt. ODFW is a strong monitoring partner and considerable data has already been collected in the basin, including a 10-year Intensively Monitored Watershed project in the Middle Fork John Day sub-basin.

**9. Board Subcommittee Ranking:** 1 of 10.**Attachment A: Initiative Map****Attachment B: Evaluation Criteria Ratings Worksheet**



Figure 3. John Day Basin Native Fish Habitat Initiative Watersheds

**FIP Priority Review:** Aquatic Habitat for Native Fish Species

**Name of Initiative:** John Day Basin Native Fish Habitat Initiative

**Name of Partnership:** John Day Basin Partnership

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## **EVALUATION CRITERIA**

### **(a) The extent to which the initiative addresses a Board-identified priority**

*Rating: Medium (+)*

#### **STRENGTHS:**

- The John Day basin hosts anadromous fish populations that are feasible for recovery. The lack of dams in the John Day watershed will contribute to the prospects for recovery.
- The North Fork John Day is designated as a Salmon Stronghold in Oregon (Wild Salmon Center 2012).
- The Middle Fork John Day has seen strong restoration momentum in recent years and the extensive monitoring work there was factored into prioritizing this watershed in the determination of the initiative geography.
- The SAP constitutes a 50-year plan that addresses high priority areas outlined in the Mid-Columbia recovery plan.

#### **CONCERNS:**

- The proposed initiative's geography focuses on three sub-basins within the John Day basin. Based on OWEB's Board-identified priority map for Aquatic Habitat for Native Fish Species, two of those sub-basins are designated as highest priorities, while the third is a second highest priority.
- Bull trout are a listed species, but the initiative does not focus on bull trout with restoration actions. Bull trout are a secondary benefitting species to the restoration work.
- Steelhead is the only listed species; Chinook are a sensitive species.

#### **ADDITIONAL COMMENTS:**

The selected geography for the initiative includes three sub-watersheds and three sub-populations.

**(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 strong governance documents that they employ well and have successfully used over the past several years.
- A 28-partner group can be challenging to coordinate; however, the partnership's governance structure with a Steering Committee and active leadership from core partners has made for efficient and effective management of the partnership.
- Recognizing the challenges of coordinating a large partnership, the application also discusses supporting additional staff to assist with the leadership needs of a large partnership.
- The partnership has a strong Outreach Plan, which reflects the thorough nature of the work of the Outreach committee. This includes a well-conceived outreach tool kit, and a strong understanding of their outreach audience, including the right tools and approaches for addressing different audiences. A highlight is the consideration of landowner ambassadors, and the notion of two-way exchange for landowners to provide input on the results of projects.
- The partnership has an appropriate allocation of funds in the partnership capacity category to support the coordination of the partnership through the initiative.

**CONCERNS:**

It is unclear how additional investments will be identified and secured given that the fundraising committee has not yet been established.

**ADDITIONAL COMMENTS:**

None.

**(c) The performance history and composition of the partnership**

*Rating: High*

**STRENGTHS:**

- All the right partners are involved in the partnership.
- The proposed initiative is ambitious and has significant ecological goals and the partnership is well poised to implement the FIP initiative.
- The partnership has demonstrated a strong history of effective planning processes.
- The partners have already dedicated a tremendous amount of work to building the partnership and demonstrated a strong commitment to success.

**CONCERNS:**

None.

**ADDITIONAL COMMENTS:**

None.

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

*Rating: High (-)*

**STRENGTHS:**

- The initiative's ecological outcomes are well-articulated in the application and provide a clear path to benefitting the targeted species.
- The application clearly linked restoration strategies to proposed ecological outcomes.
- The proposed restoration strategies and ecological outcomes clearly align with the restoration work that is needed in the basin to address recovery plan limiting factors.
- The application outlines a clear process for adaptive management throughout the course of the initiative.
- The initiative supports both water and land acquisitions, which are important to contributing to long-term sustainability of restoration strategies.

**CONCERNS:**

- The work plan is difficult to follow. Projects are not identified on a map, which proves challenging to understand whether the right actions are occurring in the right places.
- Although the restoration strategies are strong and well-articulated, they are lacking in detail and are not presented as actual restoration actions.

**ADDITIONAL COMMENTS:**

None.

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

*Rating: Medium*

**STRENGTHS:**

- The population scale hypothesis testing is described well and presents a new and interesting approach. This also offers the opportunity for larger scale adaptive management.
- The right partners are involved in the monitoring components of the initiative. This includes ODFW staff being involved in the monitoring plan development to maximize leveraging knowledge and resources.
- There are considerable monitoring efforts already underway in the basin, including the Middle Fork John Day Intensively Monitored Watershed (IMW) project. Many of these efforts are projected to continue through the duration of the proposed initiative and beyond. These efforts are also supported by numerous different funding sources.

**CONCERNS:**

- It is unclear what type of near-term indicators the partnership would use to track the trajectory of progress of the initiative.
- It is unclear why Desolation Creek was identified as an important area to focus monitoring efforts or what the data collected in Desolation Creek will tell the partners about progress toward ecological outcomes.
- It is unclear how monitoring efforts across the initiative would be linked to tell a holistic story of recovery progress in the John Day basin.
- The monitoring approach and work described in Section IV of the application is ambitious. There was concern expressed regarding the added capacity and staff time required to undertake the proposed monitoring efforts.

**ADDITIONAL COMMENTS:**

The initiative proposes to use BPA's Columbia Habitat Monitoring Program (CHaMP) program for data storage, which is a suitable approach; however, there is uncertainty about the future of the CHaMP program and longevity of the database.

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

*Rating: High (-)*

**STRENGTHS:**

- The application outlines a clearly laid out process for planning that is science-based and included the right partners.
- The use of the Atlas planning tool was clearly described, and is a strong, collaborative tool for planning, prioritization, tracking progress, and adaptive management.
- The planning process focused on the sub-population and sub-watershed level, which is an appropriate approach for planning restoration actions.
- The project scoring sheets that the partnership will use in vetting projects are excellent, and it was helpful to see the mechanics of how projects will be prioritized.

**CONCERNS:**

- The lack of a map associated with the work plan made it challenging to decipher the extent of the strategic approach to pursuing projects in different locations in the basin.
- Increasing quantifiable aspects of the approach, including acres and stream miles treated, would be helpful in understanding the restoration outputs.

**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:**

- Overall, the budget seems reasonable given the proposed approaches, actions, and timing. The allocations to different grant types are what would be expected given the proposed actions in the initiative.
- The proposed initiative features substantial match funding, which represents strong funding partnerships contributing to restoration work in the basin.
- The allocation of funding for water and land acquisitions is a strength of the initiative.
- The application, including the partnership's clearly articulated decision making process and Operations Manual, inspires confidence in their ability to get the work done and expend the funds proposed in the budget.

**CONCERNS:**

It is unclear what the partners will acquire with the proposed water acquisition funds.

**ADDITIONAL COMMENTS:**

There is a significant investment in Partnership Capacity funding. This is reasonable and appropriate to the size of the partnership and the proposed restoration actions. It would be helpful to understand in more detail how these funds will be expended, particularly as it relates to the large capacity investment in biennium 1 and the much reduced capacity investments in biennia 2 and 3.



1. **Name of Initiative:** Central Coast Estuary Conservation & Restoration
2. **Name of Partnership:** Oregon Central Coast Estuary Collaborative (OCCEC)
3. **Application Number:** 220-8209-16484
4. **Initiative addresses the following Board-identified Priority(ies):** Coastal Estuaries
5. **Initiative Abstract (*from the application*):** The following will be core partners for this Implementation FIP Initiative: Nestucca Neskowin Sand Lake Watersheds Council, Oregon Department of Fish & Wildlife, The Wetlands Conservancy, The Nature Conservancy, Confederated Tribes of the Siletz Indians, Tillamook Estuaries Partnership, MidCoast Watersheds Council and USFWS.

Our ecological outcomes are to improve the function of these key ecological attributes of estuaries from the Alsea to Tillamook: hydrologic connectivity, long-term resiliency to future change, geomorphic connectivity (including sediment regimes), water quality, and native species composition. Our main ecological outcome is: by 2030, reduce the percent loss of historic tidal wetlands across the OCCEC Focus Area due to diking from 55% to 50% by increased hydrologic connections to tidal flows, and conserve key estuary lands. This Initiative will help advance that goal through multiple estuarine conservation and restoration projects.

We will also use some of the implementation funding for capacity building, technical assistance, monitoring, data analysis, and stakeholder engagement to help pave the way for future on-the-ground projects (across our entire focus area).

Our initiative will address all of the key ecological threats identified in the Coastal Estuaries FIP ecological priority. Our focus area includes most of the largest estuaries on the Oregon Coast outside of the Columbia.

**6. Budget Overview:**

<b>Funding Period</b>	<b>OWEB Funding Request</b>	<b>Estimated Match</b>
Biennium 1	\$2,406,700	\$1,777,800
Biennium 2	\$3,205,950	\$5,983,250
Biennium 3	\$3,888,150	\$11,421,050
<b>Total</b>	<b>\$9,500,800</b>	<b>\$19,182,100</b>

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

<b>Evaluation Criteria</b>	<b>Rating</b>
A) Extent to which initiative addresses a board priority	Medium
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 measureable 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 Subcommittee Discussion Summary:**

- The unique scale of the initiative (11 central coast estuaries from the Siuslaw to Nehalem Bay) allows the partnership to draw on a larger set of lessons and build community at a regional scale.
- There is concern over how ecological uplift will be measured at such a large scale; a narrower focus would better identify where to invest in order to achieve the largest ecological impact.
- There is concern over project prioritization within the large initiative geography and among implementation partners; it is difficult to understand how habitat and ecological factors are being considered.
- The goal to reduce diked areas by 5% (equivalent to just over 950 acres across all 11 estuaries) is realistic, but not within the 6-year initiative timeline.
- Diverse partner opinions resulted in the exclusion of tide gate replacement and led to a focus on tide gate removal projects in order to achieve the largest potential ecological benefit.
- The work proposed under the initiative is critical, but the partnership is not yet ready. More work is needed to clearly develop and describe the approach to estuary restoration within this large geography, including project prioritization and measures of effectiveness for ecological outcomes.

**9. Board Subcommittee Ranking: 8 out of 10**

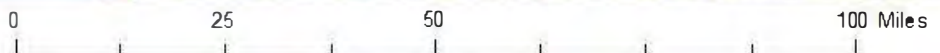
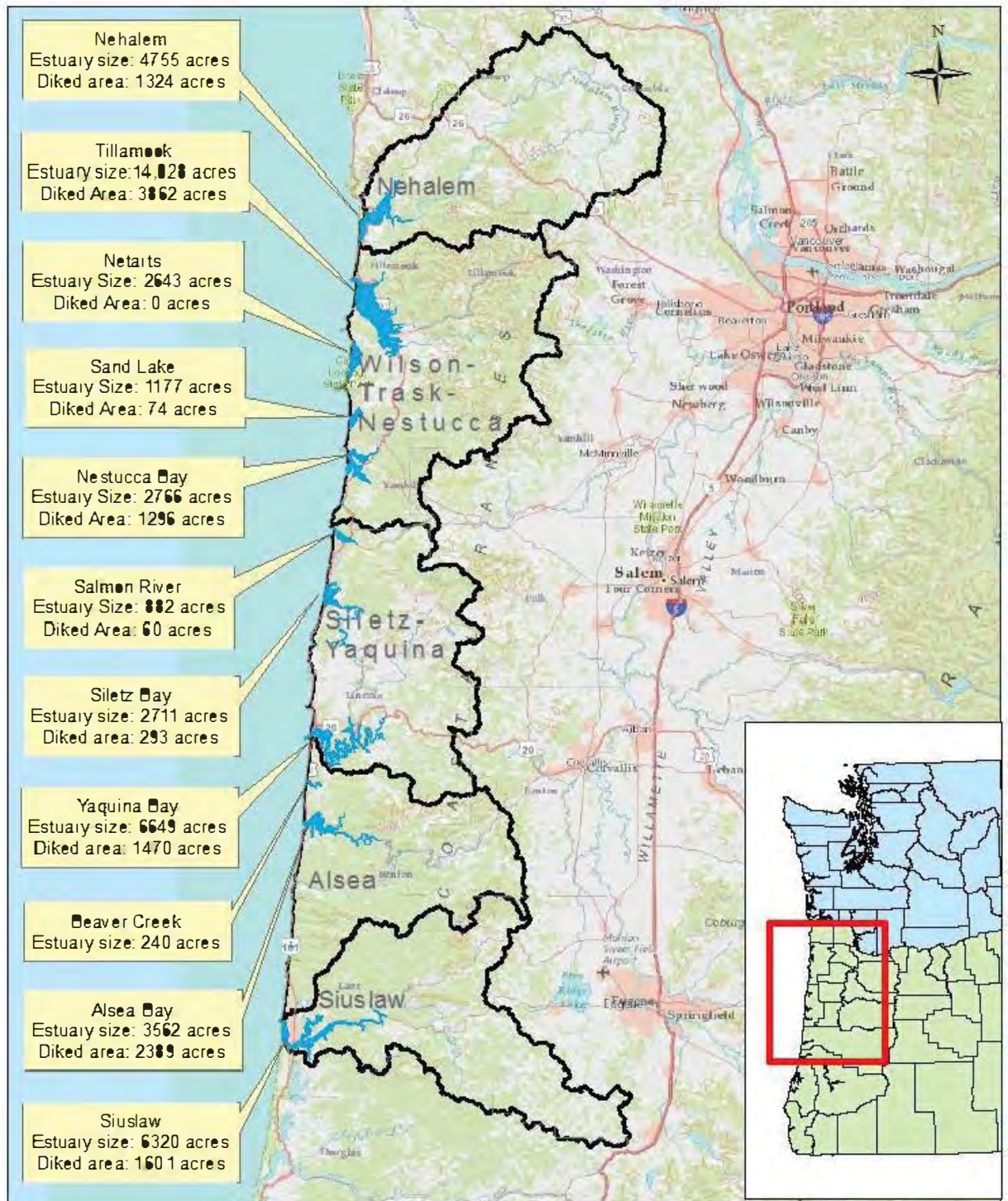
**Attachment A: Initiative Map**

**Attachment B: Evaluation Criteria Ratings Worksheet**

# Eligible FIP Initiative Activities by Estuary for Oregon Central Coast Estuary Collaborative Focal Area

Nehalem to Siuslaw: Stakeholder Engagement, Technical Assistance, Monitoring/ Data Analysis, and Capacity Building

Tillamook to Alesia: Acquisitions/Conservation & Restoration



**FIP Priority Review:** Coastal Estuaries

**Name of Initiative:** Central Coast Estuary Conservation & Restoration

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

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## EVALUATION CRITERIA

### (a) The extent to which the initiative addresses a Board-identified priority

*Rating: Medium*

#### STRENGTHS:

- The partnership fully understands the FIP Coastal Estuaries ecological priority.
- The proposal demonstrates a strong understanding of the current status and extent of habitat loss and land use change over time.

#### CONCERNS:

- The initiative encompasses a large geography, but the individual projects appear small in scale, representing only a small portion of the overall geography. Because of this, it is uncertain whether the proposed restoration work will result in significant and measurable progress.
- Despite demonstrating a strong understanding of the importance of hydrologic connectivity, the application does not articulate the ecological rationale for increased connectivity.
- The core partners are known to be a strong team with a track record of good work, but the application and work plan lack sufficient detail to describe what the partnership will do, how they will do it, how landowners will be engaged, and how decisions will be made. This makes it difficult to determine how the partnership will make measurable progress toward addressing the board-identified priority.
- The proposal does not address nutrient cycling, toxins, and water quality limiting factors.
- While hydrologic connectivity was addressed, habitat quality was not. It was noted that improved access to habitat without improved quality may not result in ecological benefits to fish.
- The application does not discuss the issue of sea-level rise; however, projects related to sea level rise and climate change are proposed.

#### ADDITIONAL COMMENTS:

This is an omnibus proposal that could have been divided into smaller subsystems.

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

*Rating: Medium*

**STRENGTHS:**

- The Nature Conservancy (TNC) is the partnership lead and facilitator. TNC involvement will likely result in greater sustainability, capacity, and longer term partnership continuity. They have allocated resources in their budget for TNC to continue in this role.
- The partnership has done well in compiling a list of projects and prioritizing those based on established criteria.
- The partnership, specifically TNC, has deep knowledge and experience in obtaining funds and will likely be successful in catalyzing additional investments.

**CONCERNS:**

- The prioritization process appears to allow each partner to pursue one project, as opposed to prioritizing based on ecological need. This could impact the partnership's capacity to make collective decisions over time.
- The communications plan could be further developed to focus on areas of greatest need. It is unclear if the partnership has the capacity and resources to complete the necessary communication.
- The communications plan focuses on communication among partners rather than community engagement. It is unclear if landowner outreach is included in the plan.
- It appears that partnership outreach to date has focused on engaging implementation practitioners as opposed to landowners and community members.
- The large geographic scale of the initiative might limit the ability to have effective outreach outside of the individual estuaries.

**ADDITIONAL COMMENTS:**

- The partnership is set up to provide support for one another - a coordinated network – as opposed to coordinating actions on the ground.
- It is unclear how the partners are leveraging their resources and expertise beyond pursuing and sharing project funds. The partnership is comprised of capable organizations, but the proposal did not demonstrate how they will support one another beyond recognizing that they are working toward similar ecological goals.

**(c) The performance history and composition of the partnership**

*Rating: Medium (-)*

**STRENGTHS:**

- The individual partners have a long history of working individually and collectively on projects across the Oregon Coast.
- The partnership possesses significant watershed expertise among the partners.

**CONCERNS:**

- The application does not describe performance history or indicate that the partners have accomplished work together in the past.
- The core partners described in the proposal differ from those in the Strategic Action Plan (SAP). The decision-making partners exclude agencies, but agencies are involved in project implementation. It is uncertain how decisions will be made if agencies implementing projects are not included as core partners.
- The process for project prioritization and adaptive management to update the SAP over time is unclear.

**ADDITIONAL COMMENTS:**

- The application does not describe how partners will stay engaged without continued project funding.
- The proposal would have benefited from a graphic of the partnership structure to depict how the core partners are organized over such a large geography.

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

*Rating: Medium (-)*

**STRENGTHS:**

The proposal includes the development of an early warning system for the arrival of non-native species, including a committee to oversee and assist in decision-making.

**CONCERNS:**

- The approach for project prioritization appears opportunistic as opposed to strategic.
- It is uncertain if the partnership has the capacity for project implementation. While many partners have implementation experience, the SAP identifies only two responsible for project implementation. The remaining partners appear to serve in supporting roles related to collecting or providing data.
- It is not clear how the partnership will achieve landowner participation. The application indicates that landowners will be contacted via email and letters, but this may not be sufficient to achieve recruitment of new projects.
- Specific actions in the work plan are not clear. Specifically, the proposal does not identify the parcels that will be acquired via purchase or easement, or how the early warning system on invasive species will be implemented.
- Because the prioritization process appears to allow each partner to pursue one project, it is unclear how proposed actions relate to desired outcomes, and how the partnership will pursue ecological-based decision making in the future.

**ADDITIONAL COMMENTS:**

None.

**(e) The ability to track progress towards proposed outcomes***Rating: Low***STRENGTHS:**

- The proposal includes a good description of baseline conditions and limiting factors at the outset of the initiative.

**CONCERNS:**

- The proposal identifies a clear goal and associated metrics (5% reduction in tidal wetland loss), but lacks a description of how data will be shared among various agencies, tribes, and other groups.
- The proposal focuses on *output* metrics (number of projects implemented) as opposed to *outcome* metrics, which would track ecological recovery or progress trajectory to measure project effectiveness.
- There does not appear to be a mechanism to evaluate and track progress toward ecological outcomes across the estuaries. It is unclear if partners in each estuary are responsible for assessing and tracking progress.

**ADDITIONAL COMMENTS:**

- The application would have benefited from including an example of restoration monitoring to demonstrate how the partnership would track progress.
- A key limiting factor in large landscape-scale projects is access to data collected by partners. The proposal would have benefited from the inclusion of a data portal or other shared data management plan.

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

- The proposal clearly presents limiting factors, using historic habitat as a baseline.
- The proposal clearly explains the issues and lays out science-based hydrologic goals.
- The situational planning to achieve goals is sound.
- The partnership's results chain work appears logical and is impressive for a partnership of this size.
- The plan for tidal marshes and wetlands is commendable.

**CONCERNS:**

- The application does not contain an explanation for how the partnership identified the goal of 5% reduction in tidal wetland loss.
- The principles of sound science are not well described. There is no discussion of tipping points or thresholds for change. There is no hypothesis for climate change or discussion of edge effects and effect on hydrologic regimes. The partner entities are recognized as being well-versed in sound science, but the application fell short in describing the scientific basis for initiative planning.

**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 reflects a strong effort to effectively estimate costs to support the partnership's budgeting.
- Funding is already secured for some budget categories.

**CONCERNS:**

- Funding for stakeholder engagement activities seems low given what is required to change public perception about estuary restoration.
- Monitoring appears underfunded, but may not have a high cost given that the partnership is proposing to collect information on the number of projects implemented rather than outcome metrics.

**ADDITIONAL COMMENTS:**

- The proposal includes only tide gate projects involving full tide gate removal. Tide gate retrofits are not part of the initiative.
- Despite a long list of potential funders in the financial plan, there is no assurance of success in obtaining funding from several of those sources, and the partnership has a heavy reliance on ODOT funding.



1. **Name of Initiative:** North Santiam Aquatic Habitat Restoration
2. **Name of Partnership:** Partners of the North Santiam Watershed
3. **Application Number:** 220-8210-16485
4. **Initiative addresses the following Board-identified Priority(ies):** Aquatic Habitat for Native Fish Species

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

The Partners of the North Santiam (PNS) is made up of 28 organizations. Core partners include the BLM, Cities of Salem and Stayton, Tribes of Grand Ronde, Siletz and Warm Springs, Greenbelt Land Trust, Linn & Marion Counties, Linn & Marion SWCDs, NRCS, North Santiam WC, ODEQ, ODF, ODFW, OPRD, Santiam Water Control District, University of Oregon, USACE and the USFS. Supporting partners consist of USGS, USFWS, ODA, ODOT, North Santiam Forest Collaborative, North Santiam Drought Task Force and the FLRCDL.

The PNS FIP initiative will implement those components of the North Santiam Resiliency Action Plan (Action Plan) that will restore the physical and biological processes identified as critical to the recovery of Upper Willamette Spring Chinook, winter steelhead, Pacific lamprey, and Oregon Chub, which in turn will improve conditions for all other native aquatic organisms utilizing the system.

Implementation funding will support outcomes focused on improving habitat connectivity, habitat complexity, riparian and floodplain habitats and water quality, while engaging the North Santiam Watershed community through educational campaigns, community events, workshops and individual interactions.

The proposed initiative addresses the limiting factors as described in the Upper Willamette River

Conservation and Recovery Plan for Chinook Salmon & Steelhead directly supporting OWEB's FIP priority for Inland "Aquatic Habitat for Native Fish Species."

**6. Budget Overview:**

<b>Funding Period</b>	<b>OWEB Funding Request</b>	<b>Estimated Match</b>
Biennium 1	\$2,526,068	\$945,192
Biennium 2	\$3,937,009	\$1,234,252
Biennium 3	\$2,244,465	\$561,116
<b>Total</b>	<b>\$8,707,542</b>	<b>\$2,740,456</b>

**7. Overall Initiative Rating: Medium**

(see attached evaluation criteria review worksheet for details)

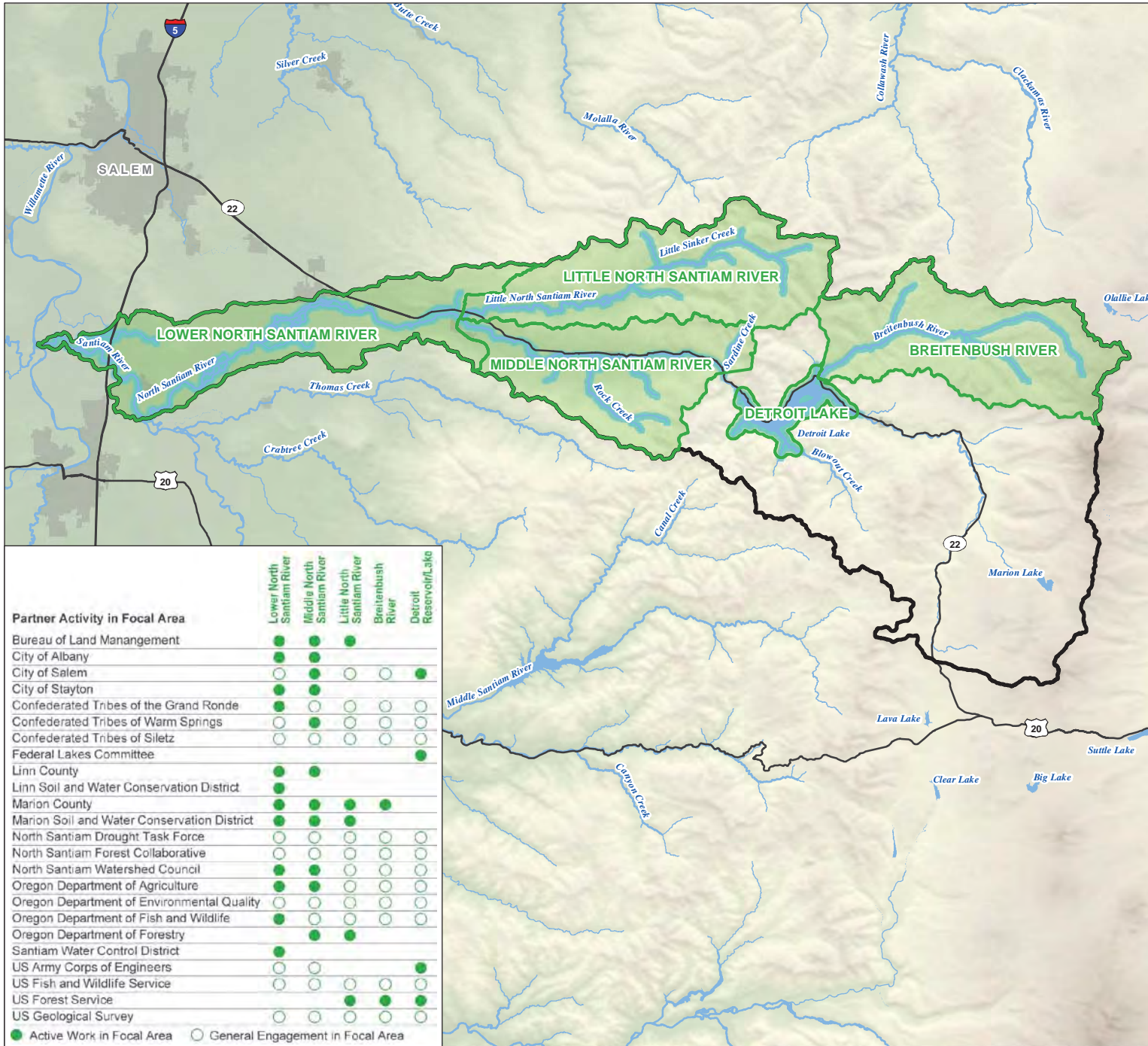
<b>Evaluation Criteria</b>	<b>Rating</b>
A) Extent to which initiative addresses a board priority	Medium (+)
B) Capacity to partner, engage the community, and catalyze additional investments	Medium (+)
C) Performance history and composition of the partnership	Medium (-)
D) Potential for progress toward measureable 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 Subcommittee Discussion Summary:**

- The North Santiam river basin is an important Willamette River tributary, providing roughly 1/3 of ESA-listed spring Chinook spawning habitat in the Willamette basin.
- The partnership uses a six-step process to prioritize projects that is consensus-based and relies on the partnership chair's leadership. The partners have been working together for many years; however, the extent to which their project prioritization has been tested in practice was unclear.
- The initiative relies on stakeholder engagement (SE) and technical assistance (TA) to develop restoration projects. There was some uncertainty as to how the SE and TA work would fit together in terms of planning and timing to implement priority restoration projects.
- Lower Bennett dam is a priority for fish passage. The partnership has allocated TA funding to develop this project in the first biennium.
- Project-level monitoring and partner roles are clear. Initiative-level effectiveness monitoring will rely on the monitoring framework in development by the Willamette FIP. Additionally, the University of Oregon is in the process of expanding the SLICES status and trends monitoring program to include the North Santiam basin.
- The initiative includes restoration actions in the Breitenbush River basin and the Detroit Lake fringes, both above the Detroit and Big Cliff dams. The Breitenbush basin offers high quality fish habitat and fertile spawning grounds. However, the US Army Corps of Engineers is responsible for downstream juvenile fish passage at the dams, and the timing and approach to constructing juvenile fish passage is uncertain.

**9. Board Subcommittee Ranking: 7 of 10.****Attachment A: Initiative Map**

**FIGURE 1**  
**OWEB Focused Investment Partnership (FIP) Initiative**  
 North Santiam Watershed Resiliency Action Plan



**LEGEND**

- FIP Initiative Area<sup>1</sup>
  - Resiliency Action Plan Focal Area
  - North Santiam Watershed
- All Other Features**
- City Boundary
  - Interstate
  - Watercourse
  - Waterbody

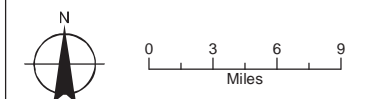
**NOTE:**

1. Includes tributary streams not shown.

**Partner Activity in Focal Area**

	Lower North Santiam River	Middle North Santiam River	Little North Santiam River	Breitenbush River	Detroit Reservoir/Lake
Bureau of Land Management	●	●	●		
City of Albany	●	●			
City of Salem	●	●	○	○	●
City of Stayton	●	●			
Confederated Tribes of the Grand Ronde	●	○	○	○	○
Confederated Tribes of Warm Springs	○	●	○	○	○
Confederated Tribes of Siletz	○	○	○	○	○
Federal Lakes Committee					●
Linn County	●	●			
Linn Soil and Water Conservation District	●	●			
Marion County	●	●	●	●	
Marion Soil and Water Conservation District	●	●	●	●	
North Santiam Drought Task Force	○	○	○	○	○
North Santiam Forest Collaborative	○	○	○	○	○
North Santiam Watershed Council	●	●	○	○	○
Oregon Department of Agriculture	○	○	○	○	○
Oregon Department of Environmental Quality	○	○	○	○	○
Oregon Department of Fish and Wildlife	●	○	○	○	○
Oregon Department of Forestry	○	●	●		
Santiam Water Control District	●				
US Army Corps of Engineers	○	○			●
US Fish and Wildlife Service	○	○	○	○	○
US Forest Service			●	●	●
US Geological Survey	○	○	○		

● Active Work in Focal Area    ○ General Engagement in Focal Area



Date: June 21, 2018  
 Data Sources:  
 Partners NSWC,  
 ESRI, USGS

**FIP Priority Review:** Aquatic Habitat for Native Fish Species

**Name of Initiative:** North Santiam Aquatic Habitat Restoration

**Name of Partnership:** Partners of the North Santiam Watershed

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## EVALUATION CRITERIA

### (a) The extent to which the initiative addresses a Board-identified priority

*Rating: Medium (+)*

#### STRENGTHS:

- The initiative geography represents a priority river basin for spring Chinook and winter steelhead identified in the Upper Willamette River (UWR) recovery plan. Restoration is essential in this geography for progress toward recovery of those listed species.
- The initiative geography offers an important opportunity to capitalize on previous property acquisition investments through the Willamette Wildlife Mitigation Program.
- In addition to UWR spring Chinook and winter steelhead, the initiative will benefit lamprey.

#### CONCERNS:

- The application, including the actions proposed in the work plan, did not demonstrate a strong tie to the relevant recovery plans.
- The inclusion of Detroit Lake raised questions regarding what other entities may already be conducting restoration and/or water quality work there and whether including the lake fringes in the initiative geography was appropriate.
- It is unclear why the Breitenbush area is included in the initiative. While it is important for addressing climate change and drought resiliency, it was not clear how it fit into the overall restoration strategy and seemed opportunistic as opposed to strategic.

#### ADDITIONAL COMMENTS:

- Downstream juvenile anadromous fish passage at the dams is not yet possible. Planning for fish passage is underway, but there is uncertainty about when this will occur. Fish passage at the dams is the responsibility of the US Army Corps of Engineers (USACE). The partnership is doing what they can control and providing habitat benefits in the basin.
- Sea lions below Willamette Falls are a concern for UWR fish species, particularly winter steelhead. However, the sea lion threat should not deter restoration practitioners from providing quality habitat in the Willamette tributaries.

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

*Rating: Medium (+)*

**STRENGTHS:**

- The collective capacity of the partnership is a strength in a watershed with diverse stakeholders.
- The partnership is well-poised to catalyze additional investments with diverse partners and pursue additional funding opportunities.

**CONCERNS:**

- The partnership has an outreach plan, but it is relatively vague.
- North Santiam Watershed Council is the coordinator/convener of the initiative; however, the leadership role is not clear as it was discussed differently in a few locations in the application and SAP.

**ADDITIONAL COMMENTS:**

Given the workload associated with managing a partnership, the partnership should ensure that sufficient resources are allocated to North Santiam Watershed Council to fulfill the partnership coordination role.

**(c) The performance history and composition of the partnership**

*Rating: Medium (-)*

**STRENGTHS:**

- The partnership has a strong performance history in the basin and is accomplished in their past work.
- The partnership's resiliency action plan and other efforts are building partnership capacity, cohesion, and momentum in the watershed. These efforts also help define roles and responsibilities among the partners.
- The right partners are in place to conduct restoration work in the upper North Santiam basin.

**CONCERNS:**

- The partnership is lacking formal governance documents, and the governance process is not clearly articulated with sufficient details in the application. It is not clear how the partnership will make complex and/or challenging decisions. This includes lacking a deeper foundation for project prioritization.
- The existing process appears to be more of a filter for the partners to bring projects forward as opposed to determining which projects are of highest priority to achieve the partnership's desired ecological outcomes in the watershed.

**ADDITIONAL COMMENTS:**

None.

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

*Rating: Medium (-)*

**STRENGTHS:**

- Conservation actions, number of projects, locations, and metrics are clearly described and the information is presented well. Implementation outputs are clearly identified.
- The proposed restoration work in the lower Santiam basin builds on previous investments with other programs in the basin.
- The proposed projects will benefit over-summer holding for listed fish species.
- The North Santiam has some of the pieces necessary to support restoration, such as limited revetments.

**CONCERNS:**

- The project prioritization process was unclear and suggested that ongoing restoration work and an opportunistic approach prevailed over a strategic approach. The prioritization criteria discussed in the application were generic and did not necessarily address limiting factors, thus it is unclear whether the right actions will occur in the right locations.
- The placement of large wood in the Breitenbush system is a restoration action in the initiative but is not part of the relevant recovery plans.
- It is unclear whether the proposed projects benefitting steelhead are the highest priority locations and whether there is enough focus on habitat benefitting steelhead. The Little North Santiam and Middle North Santiam are important areas for steelhead, but there are few projects proposed in those areas.
- The application states that before implementing proposed restoration actions associated with fish passage, the partnership must first conduct a fish passage assessment at the start of the initiative. There was concern about the timing of implementing the fish passage projects within the scope of the FIP if there are delays with the fish passage assessment.
- The application states that outreach work in the Little North Santiam basin is just beginning. There was concern about the feasibility of implementing projects in that basin during the period of the initiative given the challenges that area has had in the past with landowner relations and the lack of participation in developing projects.
- The application did not include discussion of private timber owners in the basin and what, if any, their involvement in the initiative would be.

**ADDITIONAL COMMENTS:**

The proposal discusses increasing irrigation efficiency, but improvements at diversion dams are currently not included.

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

*Rating: Low*

**STRENGTHS:**

- There are existing PIT tag data and fish counts that can benefit monitoring efforts for the initiative.
- The initiative proposes utilizing the SLICES status and trends monitoring program.
- The application discusses using the design of the Willamette FIP effectiveness monitoring framework to inform development of a monitoring program in the North Santiam; however, it was not well described how this process might work.

**CONCERNS:**

- Monitoring efforts proposed in the initiative are focused on project implementation and do not offer a clear connection to broader effectiveness monitoring for the initiative.
- The proposal does not include details regarding fish monitoring, nor how existing fish monitoring data might be incorporated, such as spawning and dam counts. Additionally, spawning counts have occurred in the basin in the past, but these will no longer be funded. Thus, there may be baseline data available but currently no means to detect change related to spawning counts.
- The application discusses using SLICES as a monitoring tool for the initiative. While SLICES is an excellent tool for status and trends monitoring, it is unclear in the application how the newly initiated SLICES research in the North Santiam basin will be used in the initiative.
- Although the Willamette FIP effectiveness monitoring approach will be well developed and may provide a model for this type of monitoring in other places, it serves the mainstem Willamette and it is not clear how it will translate to tributaries such as the North Santiam.
- The roles of partners and details of monitoring activities are lacking from the application, potentially indicating lack of a collaborative approach.
- The connection of monitoring to adaptive management for the initiative is unclear.

**ADDITIONAL COMMENTS:**

None.

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

- The application demonstrates a good understanding of restoration gaps and past/current work in the basin.
- The proposal features good consideration of climate change resiliency in restoration planning. The connection to restoration actions is not always clear, but the WATR model (Water, Aquatic habitats, Terrestrial habitats, and Riparian habitats) is an excellent tool for developing restoration concepts and strategies.

**CONCERNS:**

- The planning approach described in the application reflects one that is more opportunistic than strategic.
- The initiative features few projects in the Little North Santiam and Middle North Santiam where there may be high value in restoration benefit for listed fish 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 application presents a well balanced approach to budgeting, including recognizing and addressing the needs for partnership capacity, technical assistance, and stakeholder engagement grant types.
- The budget includes good description of the partners involved in each grant type category.

**CONCERNS:**

The monitoring budget appears to be low. This is difficult to evaluate because the monitoring plan is vague in the application.

**ADDITIONAL COMMENTS:**

None.



1. **Name of Initiative:** Little Butte Creek Watershed "Together Restoration Instream & Barriers" (TRIB) Initiative
2. **Name of Partnership:** Rogue Basin Partnership
3. **Application Number:** 220-8212-16487
4. **Initiative addresses the following Board-identified Priority(ies):** Coho Habitat and Populations along the Oregon Coast
5. **Initiative Abstract (from the application):** The Little Butte Creek Watershed "Together Restoring Instream & Barriers" (TRIB) Initiative partners include Rogue Basin Partnership, The Freshwater Trust, Rogue River Watershed Council and Trout Unlimited. The Initiative's ecological outcomes include: restore fish passage to 49 miles of habitat, restore instream habitat for 10.6 miles of stream and 44 acres of riparian forest. OWEB funding will be used toward stakeholder outreach, technical assistance for project design and permitting and contracted services for construction implementation. The proposed Initiative aligns with OWEB FIP priority "Coho Habitat and Populations Along the Oregon Coast" with goals to 1. Increase stewardship on `privately owned lands; 2. Improve access to high quality spawning and rearing habitat for Coho salmon, Chinook salmon, steelhead, Pacific lamprey and Klamath small-scale sucker; 3. Restore channel processes to streams fragmented by small dams including distribution of bed material, large wood and nutrients; 4. Improve instream habitat quality and quantity and complement barrier removal projects; 5. Reconnect floodplain, restore large wood and riparian function. These goals align directly with key Coho limiting factors and ecological threats as outlined by OWEB including impaired ecosystem functions and loss of quantity and quality of instream complexity and degraded riparian areas.
6. **Budget Overview:**

<b>Funding Period</b>	<b>OWEB Funding Request</b>	<b>Estimated Match</b>
Biennium 1	\$1,428,403	\$655,277
Biennium 2	\$2,551,430	\$621,341
Biennium 3	\$2,017,102	\$765,399
<b>Total</b>	<b>\$5,996,935</b>	<b>\$2,042,017</b>

**7. Overall Initiative Rating: Low (+)**

(see attached evaluation criteria review worksheet for details)

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

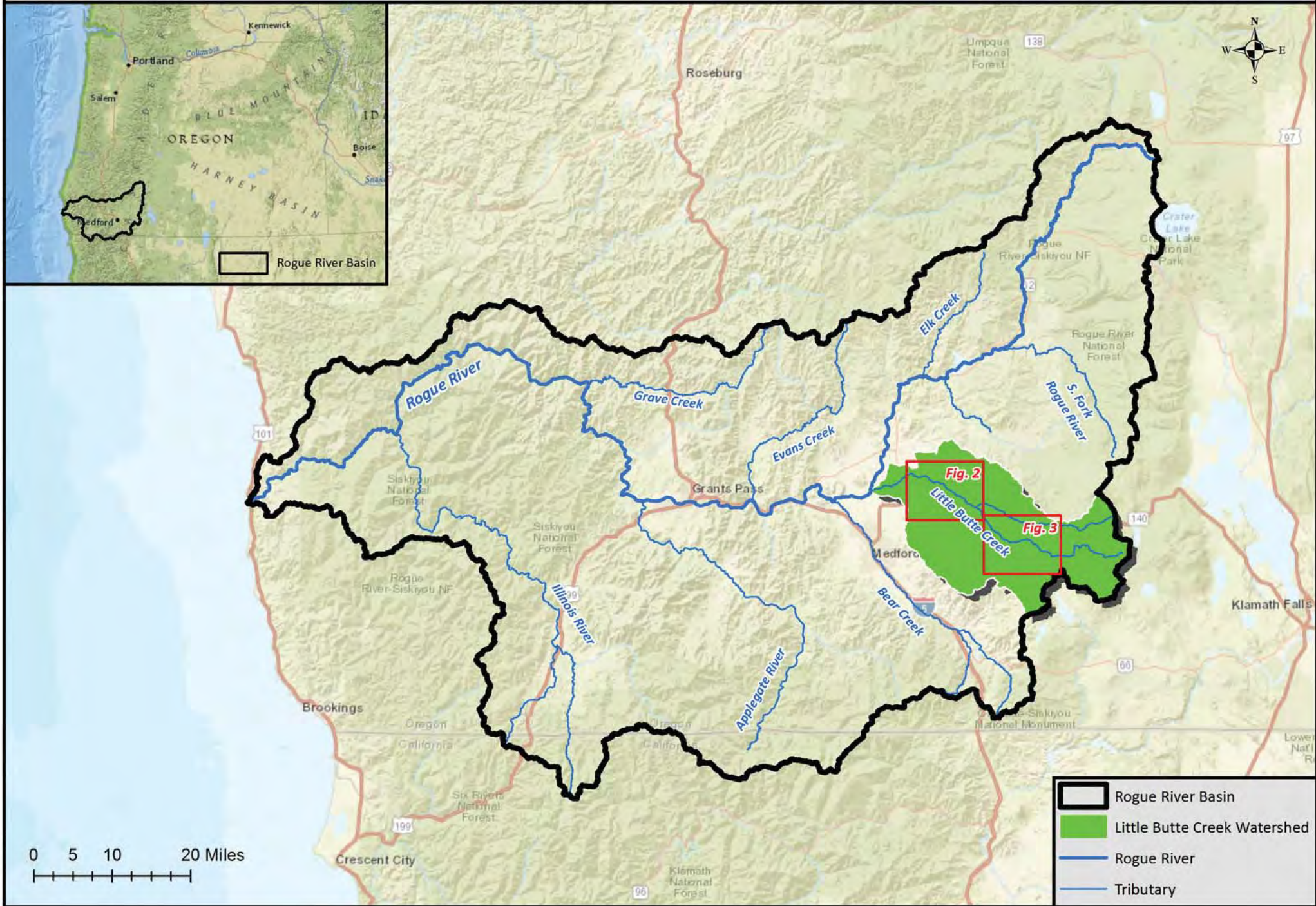
[The following sections to be completed following the OWEB Board Subcommittee applicant interviews November 7/8, 2018.]

**8. Board Subcommittee Discussion Summary:**

- The Little Butte Creek geography is appropriate for the actions proposed in the initiative.
- The partnership would benefit from stronger relationships with the soil and water conservation district and irrigation districts.
- The partnership is underdeveloped with no formal decision-making, governance, or organizational structure, and its approach is more opportunistic than strategic.
- Leadership transitions have occurred within the Rogue Basin Partnership.
- The initiative proposes actions to address the temperature limiting factor (e.g. increasing stream shade, reducing passage barriers to cooler water, and increasing instream wood to create deep pools).
- There is concern over the omission of stream flow in the initiative; however, Trout Unlimited is an external partner for water acquisitions, and may pursue these projects outside of the initiative.
- All projects identified in the work plan are on private land; stakeholder engagement is critical and many partners are currently working with landowners in the area.
- There is concern over the lack of detail on effectiveness monitoring for fish passage and riparian health; the partnership is in the process of developing protocols.

**9. Board Subcommittee Ranking: 9 (tie) out of 10****Attachment A: Initiative Map****Attachment B: Evaluation Criteria Ratings Worksheet**

# Figure 1. Little Butte Creek Watershed Restoration Initiative - Location Map



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

**Name of Initiative:** Little Butte Creek Watershed “Together Restoration Instream & Barriers” (TRIB) Initiative

**Name of Partnership:** Rogue Basin Partnership

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## EVALUATION CRITERIA

### (a) The extent to which the initiative addresses a Board-identified priority

*Rating: Medium (-)*

#### STRENGTHS:

- Generally, the approach described in the proposal is well-organized and achievable.
- The focus of the initiative is on the Little Butte Creek 5<sup>th</sup> field Hydrologic Unit Code (HUC), an important tributary for Coho and other species.

#### CONCERNS:

- The focus on a single 5<sup>th</sup> field HUC and the ecological outcomes described in the proposal do not achieve a broader regional impact envisioned for the Focused Investment Partnership program.
- While the Little Butte is important for Coho in the Rogue Basin, the proposal does not articulate the rationale for the selection of this geography. There was little data provided that indicated that this HUC is the place to work or how it fits into a basin-wide prioritization, which gave the impression that selection of the geography was opportunistic rather than strategic.
- The proposal does not describe how this initiative connects to the Coho Business Plan’s Strategic Action Plan, which will be developed over the next year and will have an overlapping geography.
- The proposed approach is general in nature; the proposed actions do not appear to link to the primary limiting factors in the watershed, including limited stream flow.

#### ADDITIONAL COMMENTS:

None.

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

*Rating: Medium*

#### STRENGTHS:

- The Rogue Basin Partnership (RBP) partners have a good history of working together, and supporting partners in the basin feel that the RBP is doing good work in their region.
- The RBP will be able to catalyze funding.



**CONCERNS:**

- Despite the high capacity of individual partners and the strength of the RBP, which has a strong structure for decision making, this initiative is proposed by a subgroup of the RBP, and the subgroup does not have a formal relationship or governance outside of the RBP.
- The proposal does not provide detail about stakeholder engagement. It includes broad ideas about outreach and messaging for the entire Rogue basin, but not specifically for the initiative geography. It was noted that stakeholder engagement beyond the large acreage or prominent landowners will be important in this area.
- Some of the contributing organizations have not yet committed match funding.
- The proposal is not clear on how the partnership capacity funds would be used given that there is a smaller group of core partners among the larger partnership that would be implementing the restoration work.

**ADDITIONAL COMMENTS:**

There are three core partners – Rogue Basin Partnership, Rogue River WC (RRWC), and The Freshwater Trust (TFT). RRWC and TFT have great history of working together.

**(c) The performance history and composition of the partnership**

*Rating: Low (+)*

**STRENGTHS:**

The group is capable of getting the work done, but do not have all of the partners engaged, or a formal decision-making process specifically for the FIP initiative.

**CONCERNS:**

- RBP is an umbrella organization with many different partners, consistent meetings, and successful working groups. This proposal was written by a subgroup of one of the working groups that seems to lack engagement with the larger partnership. While the RBP has an effective structure and communication network, it does not necessarily carry over to the core partners of this initiative.
- The three core partners of this initiative do not have a formal decision-making process. The decision-making process and structure appears to be based on trust and a history of working together.
- The proposal does not describe governance at the various scales of the partnership or how it will be managed. The link between the RBP and this subgroup is unclear. In particular, it is unclear how the goals of the larger RBP led the subgroup to propose these actions in this area.
- It appears that communication between partners is unclear or may be under-developed. Specifically, reviewers noted that the Soil and Water Conservation District (SWCD) is not a core partner; however, the proposal states that landowner engagement is to be

completed by the SWCD. The SWCD's role is critical, but they do not yet seem committed to the partnership.

- In addition to the SWCD, local irrigation districts do not seem engaged with the partnership. Reviewers questioned why entities responsible for implementing portions of the work plan appear to not be engaged in the partnership, and noted that this oversight is a missed opportunity.

**ADDITIONAL COMMENTS:**

None.

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

*Rating: Low*

**STRENGTHS:**

- Fish passage is an issue in the target watershed and is an appropriate focus.
- This is a clear and simple approach towards addressing a known issue in the watershed.

**CONCERNS:**

- The proposal lacks an examination of limiting factors at finer scale. The initiative proposes a broad approach, and appears to have no cohesive strategy that will lead to a larger ecological outcome.
- The proposal lacks sufficient detail to determine whether project prioritization and landowner outreach have been completed. It does not specify which barriers are being addressed, or their associated habitats and location in the system. Without these details, it is difficult to determine the potential outcomes to be achieved through this initiative and whether the approach will be successful.
- The proposal lacks detail on community outreach and landowner engagement. Many projects will require building trust with the community and landowners, which may be difficult in this watershed. Therefore, a more thorough outreach plan is needed.
- Fish passage is an issue in Little Butte Creek, yet the proposal did not discuss fish screening at water diversions.
- The proposal mentions restoring flow, but there are no restoration actions specifically related to flow in the work plan. In addition, there are no funds for water acquisition or leasing. It is unclear if the partnership is planning to include flow restoration actions.
- Additional work in this watershed may be difficult because the 'low hanging fruit' projects have been done. The proposal could have provided more assurances that projects are going to happen.

**ADDITIONAL COMMENTS:**

None.

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

*Rating: Low*

**STRENGTHS:**

The proposal includes a good description of data collection, management, and reporting using field-based tablets.

**CONCERNS:**

- The description of baseline conditions is inadequate.
- The approach to effectiveness monitoring is lacking; it is unclear what data will be collected for fish passage and riparian health projects.
- The monitoring proposed does not easily inform adaptive management that may be necessary as the initiative is implemented.
- The proposed monitoring is unlikely to answer the overly broad hypotheses.

**ADDITIONAL COMMENTS:**

None.

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

*Rating: Low*

**STRENGTHS:**

The proposal brings valuable planning tools to the process, including tools for small dam removal projects, prioritizing erosion mitigation projects, and instream flow prioritization.

**CONCERNS:**

- This area was identified as very important in the Upper Rogue Coho Business Planning process, but the proposal seems premature given the planning and analysis underway through that effort. It appears that project prioritization planning has not yet been completed.
- The proposal lacks a detailed analysis of limiting factors.
- There is sufficient data and information available for Little Butte Creek, but the proposal is too general and does not make reference to the data.
- While the proposal mentions valuable technical tools, it does not describe the result of the execution of these tools for the 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: Low*

**STRENGTHS:**

None

**CONCERNS:**

- The initial investment in stakeholder engagement seems appropriate, but there is no outreach plan to describe stakeholder engagement actions and approach.
- The stakeholder engagement funding may not be sufficient unless the match is secured. It is unclear if the match proposed is earmarked for the Little Butte watershed or if it is part of a larger initiative.
- The types of projects the partnership is proposing (e.g., dam removal) can be expensive. It is unclear whether enough funds are budgeted for restoration actions.
- There are no funds requested for water acquisition. Given that water quantity is a critical issue in this area, budget allocation for water acquisition projects would support the initiative goals.

**ADDITIONAL COMMENTS:**

None.



1. **Name of Initiative:** Rogue Forest Restoration Initiative
2. **Name of Partnership:** Rogue Forest Restoration Partnership
3. **Application Number:** 220-8213-16488
4. **Initiative addresses the following Board-identified Priority(ies):** Dry-Type Forest Habitat, Oak Woodland and Prairie Habitat

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

**Core partners:**

- Southern Oregon Forest Restoration Collaborative (SOFRC)
- Lomakatsi Restoration Project (LRP)
- The Nature Conservancy (TNC)
- USDA Rogue River-Siskiyou National Forest (RRSNF)
- USDI Bureau of Land Management, Medford (MBM)
- OSU Extension, Jackson/Josephine County (FNR)
- Oregon Department of Forestry (ODF)
- Klamath Bird Observatory (KBO)

**By 2025: Ecological Outcomes:**

- 1) By 2025, landscape resilience is improved by a shift toward the natural range of variability in seral structural states (Haugo et al. 2015) in fully-treated project areas (~50,000 acres) by protecting complex forest habitat and increasing the proportion of open dry-type forest habitat.
- 2) Wildfire risk to dry-type forest habitat, NSO habitat and local communities in planning units (~50,000 ac) where the Rogue Basin Strategy approach and tools are fully implemented, i.e. in the Upper Applegate, will be reduced from current levels by 50 percent.

**By 2025: Social Outcomes:**

- 3) Community support for forest restoration and reintroduction of beneficial fire is increased by 10% as evidenced in poll respondents' attitudes at a time-series of project-related community workshops.
- 4) Improve capacity for collaborative partners to plan and implement forest restoration projects consistent with the Rogue Basin Strategy.
- 5) Improve socioeconomic conditions and workforce capacity in the Rogue Basin by generating jobs and economic activity. Funding will be used for thinning and prescribed Fire conservation actions and to catalyze collaboration, support and capacity within the Rogue Basin.

**6. Budget Overview:**

<b>Funding Period</b>	<b>OWEB Funding Request</b>	<b>Estimated Match</b>
Biennium 1	\$1,500,000	\$944,250
Biennium 2	\$2,700,000	\$1,699,650
Biennium 3	\$1,800,000	\$1,133,100
<b>Total</b>	<b>\$6,000,000</b>	<b>\$3,777,000</b>

**7. Overall Initiative Rating: High (-)**

(see attached evaluation criteria review worksheet for details)

<b>Evaluation Criteria</b>	<b>Rating</b>
A) Extent to which initiative addresses a board priority	High
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 measureable 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 Subcommittee Discussion Summary:**

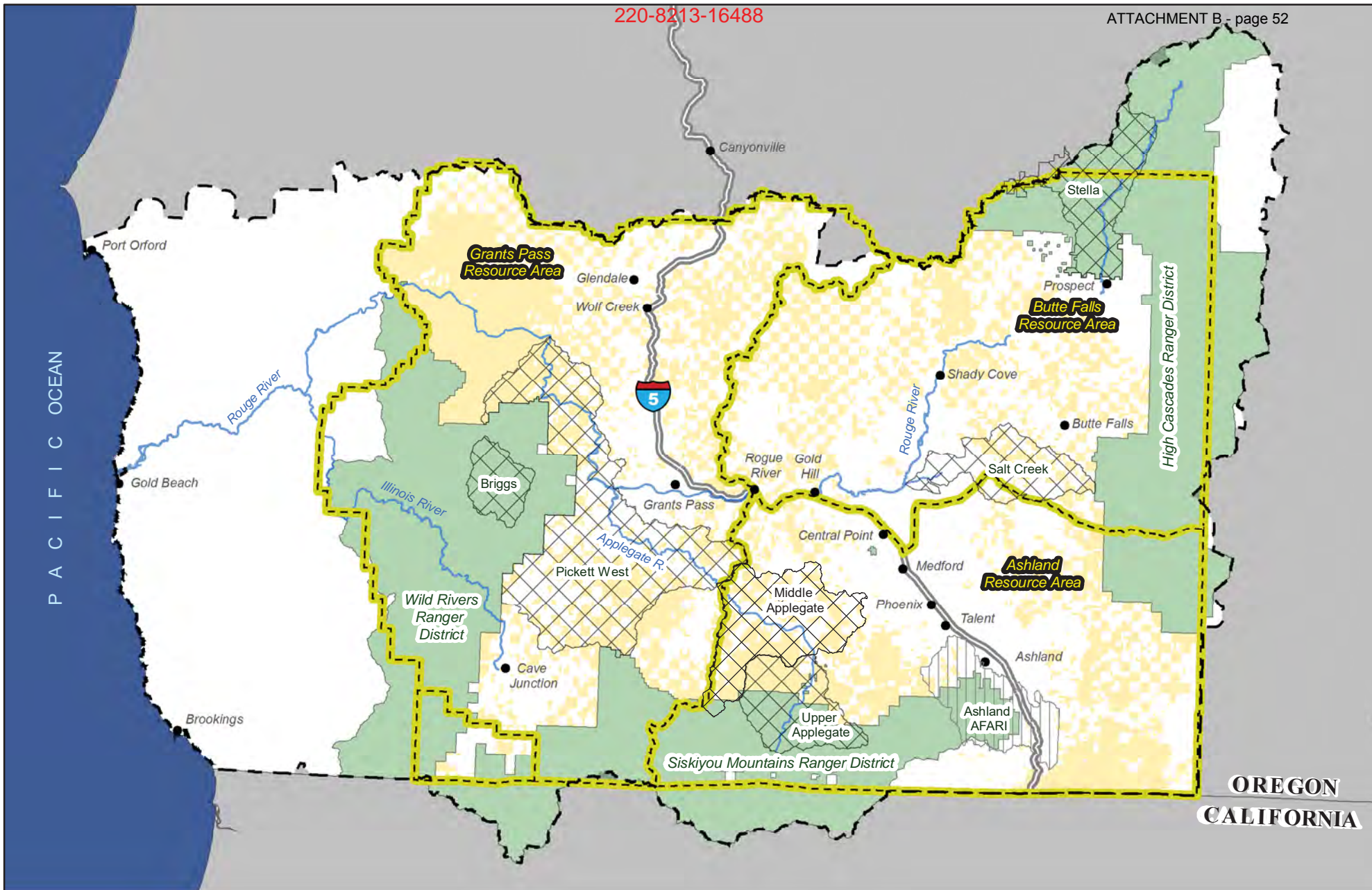
- Core members of the partnership are building off of the momentum generated through dry-forest restoration actions in the Ashland Forest All-lands Restoration Initiative.
- Dry-forest restoration is a critical issue in Southwest Oregon, and the partnership contains the right members to be successful in that region.
- The National Environmental Policy Act (NEPA) process for proposed actions on federal land is in various stages of completion; there are treatment projects that are currently 'NEPA-ready' for implementation.
- The initiative proposes to treat both federal and private land in the geography, with the majority of treatments occurring on federal land. This ratio of federal/private land treatments is an issue of concern.
- A Master Stewardship Agreement between the U.S. Forest Service and other initiative partners was signed the week of the subcommittee meeting. The details of this agreement are important for board members to understand, as the agreement helps set the context for how revenue generated through the sale of commercial materials to be reinvested in the initiative. Subcommittee members requested staff to follow up with partners in order to provide details in advance of the January board meeting. *Staff discussed the Master Stewardship Agreement with the partnership following the subcommittee meeting. The Master Stewardship Agreement is an enabling document for the partnership; Supplemental Project Agreements will be generated that describe*

*the financial arrangements and will be tiered to the Master Stewardship Agreement. The U.S. Forest Service match included in the proposal includes both committed federal appropriations and a conservative estimate of anticipated stewardship revenue that is generated through these agreements.*

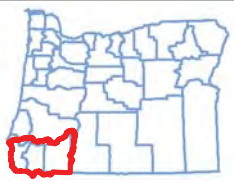
**9. Board Subcommittee Ranking: 4 out of 10**

**Attachment A: Initiative Map**

**Attachment B: Evaluation Criteria Ratings Worksheet**

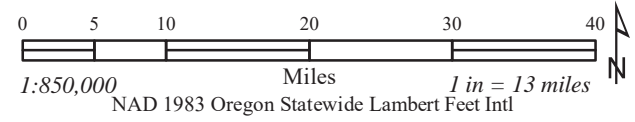


SOFRC GIS Unit  
June 26, 2018, 0921 hrs



RBS Footprint and Oregon Counties

### ADMINISTRATIVE FOREST MGMT BOUNDARIES Rogue Forest Restoration Initiative (RFR)



- RFR Focus Area
  - Ashland AFARI
  - Rogue Basin Strategy Planning Footprint
  - BLM Administrative Boundaries
  - USFS Administrative Boundaries
- Landowner**
- BLM

**FIP Priority Review:** Dry-type Forest Habitat

**Name of Initiative:** Rogue Forest Restoration Initiative

**Name of Partnership:** Rogue Forest Restoration Partnership

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## EVALUATION CRITERIA

### (a) The extent to which the initiative addresses a Board-identified priority

*Rating: High*

#### **STRENGTHS:**

- The initiative is well-founded in the peer-reviewed science, and the partnership did a good job in relating the proposed work to the 'Dry-type Forest Habitat' board-identified priority.
- The initiative is technically robust and grounded in local data and analysis.

#### **CONCERNS:**

While the proposed geography is located in high priority areas for forest restoration, there are several sub-watersheds listed in the proposed geography, which led to some confusion. A more refined focus may result in a greater ability to make meaningful impacts.

#### **ADDITIONAL COMMENTS:**

None

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

*Rating: Medium (+)*

#### **STRENGTHS:**

- The partners have forest restoration experience in this geography, and have had success in engaging the community around this complex issue.
- The partnership has demonstrated a remarkable ability to catalyze investments through federal programs.
- The partners have a long history of collaboration in various forms, with strong planning efforts in southern Oregon.

**CONCERNS:**

- The governance charter in the application appears to be developed specifically for the FIP proposal. Many aspects of the partnership governance seemed speculative; it is unclear what is actually in place and what will be implemented if the partnership receives FIP funding.
- The partners are not requesting capacity funding in the third biennium of the initiative. This may be a critical stage where important questions are being asked in the community, and it would be important to have funding for partnership coordination. The lack of capacity funding either requested from OWEB or provided as match in the third biennium brings into question the long-term sustainability of the partnership.

**ADDITIONAL COMMENTS:**

- The implementation of forest restoration work in this area has been challenging, but mostly due to the complicated process involved. There is nothing that the partners have been doing incorrectly.
- It is unclear whether local businesses engaged in forest thinning operations may be involved in the proposed work, or if all the thinning contracts will go to a single entity.

**(c) The performance history and composition of the partnership**

*Rating: Medium (+)*

**STRENGTHS:**

- The partnership has the correct entities involved, and the core partners have demonstrated their ability to work collaboratively on a challenging and complex topic.
- The partnership has developed excellent planning documents, which will be critical for implementing complex forest restoration work.
- The partnership has local credibility, which is an important consideration for potentially implementing work on federal land.

**CONCERNS:**

The partners have dramatically increased capacity in recent years to implement forest restoration work (e.g., in the Ashland forest); however, if this initiative is funded, similar capacity increases may be required.

**ADDITIONAL COMMENTS:**

None

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

*Rating: Medium (+)*

**STRENGTHS:**

- Dry-type forest restoration, through the implementation of forest thinning and prescribed fire, is a high ecological priority in this region.
- The partners have identified the number of target acres that are sufficient to make quantifiable progress towards forest restoration.
- Oak prairie and woodland restoration is an important aspect of the proposal and may provide additional interest in implementation, as there is community support for this type of work.

**CONCERNS:**

- The majority of this initiative is on federal land, and stewardship authority does not appear to have been granted. Stewardship authority would allow partners to re-invest in the project with the sale of commercial material generated through thinning. In other areas of the state, stewardship contracts have provided significant funding for forest restoration projects, which dramatically reduces the cost to grantors.
- There is confusion on how private parcels will be prioritized for restoration.
- It is not clear if the National Environmental Policy Act (NEPA) process has been initiated or completed on the federal land included in the proposal. The NEPA process can be time-consuming, and may delay project implementation for a significant amount of time.

**ADDITIONAL COMMENTS:**

- Communication with landowners is reaching a tipping point where landowners are realizing that fire is a threat to their property and they need to do something about it. It would be helpful to demonstrate private landowner buy-in to the project to show that they are committed to the cause.
- Forest restoration in this part of the state is often on steep slopes, which are more expensive to work on. However, this may be balanced by access to the commercial market, which is comparatively high in this region.

**(e) The ability to track progress towards proposed outcomes***Rating: High***STRENGTHS:**

- The partnership is utilizing the sound and proven monitoring approach that has been successful in the Ashland Forest All-Lands Restoration FIP initiative.
- The work plan clearly describes pre/post-project monitoring that will occur throughout the life of the initiative.
- The partnership includes the right entities to successfully track the progress of the initiative, with meaningful metrics that will guide the partnership in adaptive management measures.

**CONCERNS:**

The proposal describes multiple areas that are the focus of the initiative, one of which it does not appear restoration will occur (Stella). With such a wide geography, it may be difficult to track measurable progress towards reaching the proposed ecological outcomes, as opposed to a single distinct geography.

**ADDITIONAL COMMENTS:**

None

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

- The partnership intends to implement a technically robust initiative that is built on established science and planning tools.
- The focus on oak prairie and woodland restoration is important and fits well with regional planning efforts.

**CONCERNS:**

- It is unclear if the proposed treatment acres are identified specifically in the planning documents. A planning document cross-walk would have been helpful.

**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 match funding for stakeholder engagement in the first two biennia is impressive.
- Overall, the budget was thoughtful, with a good mix of proposed grant types found throughout the life of the initiative.

**CONCERNS:**

- As commercially viable material will likely be removed on federal land, the proposed restoration match appeared quite low for the proposed OWEB investment.
- Given the social complexity of forest restoration in the proposed area, it would be important to maintain a high level of stakeholder engagement throughout the initiative, including the third biennium.
- The requested monitoring funds may be low, particularly in the first biennium where baseline data would presumably be collected.

**ADDITIONAL COMMENTS:**

While the match for stakeholder engagement in the first two biennia is high, it would be beneficial to understand how this fits into the project (i.e., is it secured funding for stakeholder engagement in the project area or does it entail work that has already been complete?).

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:** 220-8211-16486
4. **Initiative addresses the following Board-identified Priority(ies):** Coho Habitat and Populations Along the 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:**

<b>Funding Period</b>	<b>OWEB Funding Request</b>	<b>Estimated Match</b>
Biennium 1	\$4,000,000	\$3,555,000
Biennium 2	\$4,000,000	\$5,045,000
Biennium 3	\$4,000,000	\$6,010,000
<b>Total</b>	<b>\$12,000,000</b>	<b>\$14,610,000</b>

**7. Overall Initiative Rating: Medium (+)**

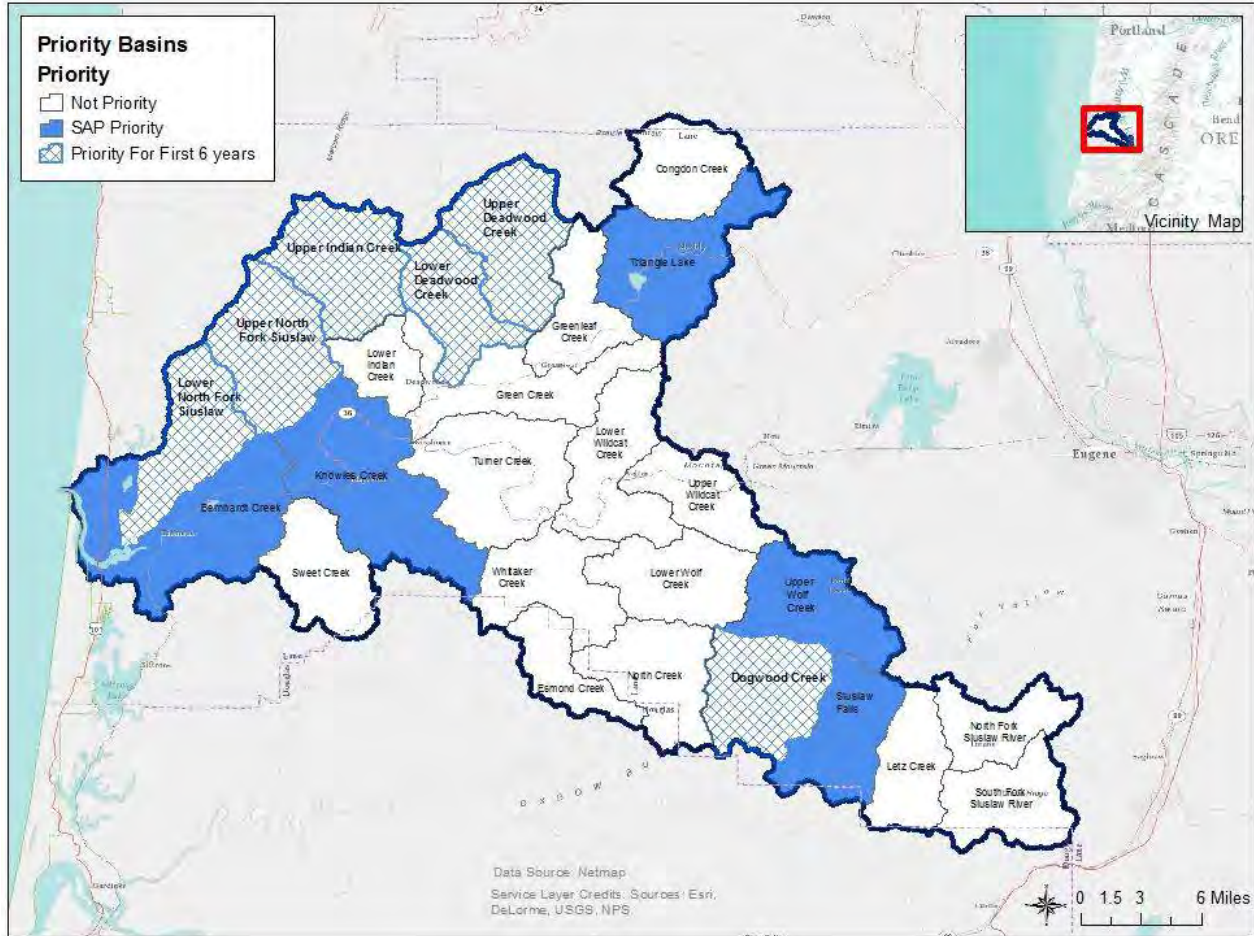
(see attached evaluation criteria review worksheet for details)

<b>Evaluation Criteria</b>	<b>Rating</b>
A) Extent to which initiative addresses a board priority	High (-)
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 measureable 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	High (-)

**8. Board Subcommittee Discussion Summary:**

- The partnership is ripe and coho are a priority.
- The partnership includes two Tribes who bring staff and expertise to the initiative.
- The partnership provided strong responses to questions raised by the expert review panel relative to increasing instream complexity and long-term resilience of the system.
- The monitoring plan includes Aquatic Inventory (AQI) metrics and rapid bio-assessment pre- and post-implementation to understand complexity; and the partnership is developing additional techniques to monitor instream complexity over time.
- The number of proposed acquisitions in the initiative appears is large (17); however, landowner engagement efforts have begun, and it was noted that individual landowners own multiple parcels, which reduces the number of transactions.
- Coastal lakes are culturally significant to the Tribes; coho populations in the lakes are some of the most viable in the ESU.
- There is concern over non-native, warm water species in the coastal lakes; however, the removal of warm water species involves a regulatory approach that is not within the scope of the voluntary initiative. Instead, the focus is to offset the impact of non-native fish.

**9. Board Subcommittee Ranking: 6 out of 10****Attachment A: Initiative Map****Attachment B: Evaluation Criteria Ratings Worksheet**



**Figure 8-1. Priority sub-watersheds for restoration projects in the Siuslaw Basin.**

Table 8-1 provides a summary of the area proposed for – or affected by – restoration projects in the priority sub-watersheds that the SCP selected as focus areas for restoration between 2018 and 2023. The numbers in the table represent the total of all of the objectives contained in this chapter. (Note the number in the goal statements represents the total length of channel, tributaries and mainstem that will be treated through one of the restoration strategies described in Chapter 7.) The goals do not equal the total of the objectives because some reaches receive multiple types of restoration.

**FIP Priority Review:** Coho Habitat and Populations along the 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

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**EVALUATION CRITERIA****(a) The extent to which the initiative addresses a Board-identified priority**

*Rating: High (-)*

**STRENGTHS:**

- The geography is manageable in size and can accomplish a significant amount of restoration needed for initiative and Oregon Coast (OC) Coho recovery.
- Delisting OC Coho is a high priority for the state. The OC Coho Evolutionary Significant Unit (ESU) is entirely within Oregon. Implementing this initiative would be an important step in on-the-ground restoration in a high priority location, with an established partnership.
- The proposal refers to state and federal recovery plans and addresses limiting factors.
- The proposal shows an understanding of limiting factors, including water quality. The proposal includes a strong strategy of applying limiting factors at the subwatershed scale, as opposed to only looking at the larger population limiting factors.
- The project prioritization and decision-making processes are carefully designed and data driven.
- The proposal provides a strong statement of strategies and how those strategies relate to outcomes.
- Measures of success are based on baseline data that is already available.

**CONCERNS:**

- The Strategic Action Plan drills down into specific subwatersheds in order to better demonstrate success; this might mute the impact at the population scale.
- The coastal lakes component of the initiative does not accurately align with limiting factors based on the Oregon Department of Fish and Wildlife (ODFW) recovery plan, which includes non-native fish. The proposal mentions non-native fish, but does not identify actions to address the issue. It is unclear why the Coastal Lakes geography was included in the proposal and what percentage of the overall request would be allocated to this geography.

**ADDITIONAL COMMENTS:**

None.

**(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 partnership has worked well together over a long period. There is a high level of confidence that the partnership will get the work done and find ways, through their governance structure, to allocate resources.
- The proposal demonstrates deep thinking into subwatershed prioritization, and a good decision-making process and rationale for prioritization.
- The partnership has a capable, designated leader in the watershed council.
- The MOU provides great detail and description of how partnership decisions are made, including the process for bringing in new partners.
- Partners have deep knowledge of public and private funding sources and have a great ability to catalyze funding.
- The partnership has already completed its communication plan.

**CONCERNS:**

- Communication and stakeholder engagement outside of those associated with implementation activities are not included in the work plan or budget. It is unclear if the partnership has sufficient capacity and funding to implement the communication plan.
- Proposed funding is focused on implementation and may not provide sufficient resources to manage and coordinate the partnership.

**ADDITIONAL COMMENTS:**

None.

**(c) The performance history and composition of the partnership**

*Rating: High (-)*

**STRENGTHS:**

- The proposal demonstrates that the partnership has worked together for decades and there are long-standing relationships between partners.
- The watershed council has a history of bringing divergent groups together in the watershed to address controversial topics.
- The partnership developed a formal governance structure through the Development FIP program.

**CONCERNS:**

The partnership could benefit from hiring staff or an outside consultant to provide coordination and leadership for the partnership. Capacity funding should be used to provide staff assistance to the watershed council.

**ADDITIONAL COMMENTS:**

None.

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

*Rating: Medium*

**STRENGTHS:**

- While the proposal may not fully articulate the connection between actions and outcomes, the restoration actions detailed in the work plan provide an excellent strategy to address watershed processes and promote life history diversity. The strategy includes robust outputs that are likely to result in measurable ecological outcomes.
- The proposed wetland acquisition and floodplain reconnection projects promote life history diversity and may provide resiliency.
- Large wood placement is often a functional, temporal activity that does not necessarily equate to channel complexity. Large wood recruitment has historically been a challenge in coastal systems; however, the proposal describes an anchor habitat approach for wood placement, which prioritizes where large wood is most likely to promote flood plain interaction and increase instream complexity. Wood placement is also targeted at late-successional reserves for future large wood recruitment.
- The action plan emphasizes floodplain reconnection, much of which is tidal, and provides a balance of protection activities through upland acquisitions.
- The targeted 6<sup>th</sup> field Hydrologic Unit Code (HUC) scale approach taken by the partnership is likely to result in measureable impact.

**CONCERNS:**

- The proposal and action plan does not define resilience or instream complexity.
- The North Fork, part of the initiative focus area, includes new acquisitions and tidal restoration identified in the recent landward migration work completed as a priority for mitigating sea level rise; however, the proposal did not elaborate on climate change as the reason for including the North Fork in the focus area. In particular, there could have been emphasis on how the proposed projects in this area could play a role with the various sea level rise scenarios.
- The action plan does not address the primary limiting factor in the coastal lakes.

**ADDITIONAL COMMENTS:**

There was a lack of consensus among reviewers on the topic of large wood placement as a restoration strategy and whether it would increase instream complexity. It was noted that the anchor habitat approach prioritizes where large wood is most likely to promote floodplain interaction and support multiple life stages; however, the addition of large wood alone may not result in increased channel complexity.

**(e) The ability to track progress towards proposed outcomes***Rating: Medium (-)***STRENGTHS:**

- The monitoring framework is strong, and restoration implemented at the subwatershed scale is well-described. The partners recognize that ODFW data is available to utilize in their initiative.
- The proposal clearly describes how strategies will lead to measureable progress.
- Based on the budget and description, the monitoring proposed is robust. It includes thermal barriers and thermistor deployment and is habitat focused.

**CONCERNS:**

- Monitoring is at the project implementation level and does not monitor program-level objectives. While it is difficult to directly link restoration actions to increased fish life history diversity and population viability, the monitoring of objectives and the link to fish benefits were not well-described. The biological monitoring for fish is missing from the framework.
- The proposal does not define stream channel complexity, which will make progress toward increasing complexity difficult to measure.
- Sediment monitoring could have been better tied to the proposed restoration approach.
- It is unclear if the partnership has the capacity to complete the proposed monitoring.

**ADDITIONAL COMMENTS:**

The review team discussed the challenge of trying to link restoration actions to ecological outcomes in a measurable, meaningful way. Reviewers noted that there is a consistent reluctance of local planning groups to tie their restoration results to fish because there are so many variables beyond their control, such as commercial harvest and ocean conditions.

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

- The prioritization exercise was a rigorous, data-driven process that aligns with limiting factors.
- The 6<sup>th</sup> field HUC scale is strategic, manageable, and identifies specific needs within each watershed.
- The stronghold and anchor habitat approach makes protection a priority rather than only working in degraded areas.
- The work plan was well-developed and logical with useful maps that illustrated where projects have been completed and where future work is planned.
- The landowner engagement and economic development components of the work plan are sound.



**CONCERNS:**

- The proposal describes fairly strong targets for temperature and wood, but lacks **of** discussion and definitions for resilience, fish life history diversity, complexity, and how they would be measured.
- Inclusion of the coastal lakes is not well-aligned with the limiting factors and may not be a good approach for achieving goals.
- The climate change analysis could be stronger with a more explicit acknowledgement of how the partnership will deal with future climate change impacts to the system.
- The distribution of priority watersheds may limit benefits to fish life history diversity. The proposal seems more focused on species abundance.

**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 budget is distributed well over the various budget categories.

**CONCERNS:**

This proposal is requesting the maximum budget amount, which may not be necessary if the coastal lakes portion of the proposal is omitted.

**ADDITIONAL COMMENTS:**

The budget for stakeholder engagement appears low given the extensive landowner engagement in the proposal; however, the budget may be adequate given the large amount of proposed match.

1. **Name of Initiative:** Wallowa North Forest Health Initiative
2. **Name of Partnership:** Wallowa Forest Health Partnership
3. **Application Number:** 220-8214-16489
4. **Initiative addresses the following Board-identified Priority(ies):** Dry-Type Forest Habitat

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

The core partners in the Wallowa Forest Health Partnership (Partnership) include the Wallowa Soil and Water Conservation District (SWCD), the Natural Resources Conservation Service Enterprise Field Office (NRCS), and the Oregon Department of Forestry-Wallowa Unit (ODF). The Partnership is applying for OWEB FIP funding to take a cohesive approach to improve the ecological state of the dry-type forests in the Wallowa North Project Area, while improving fish and wildlife habitat. The Partnership will also increase the public's knowledge on various forest health issues threatening Wallowa North, restoration actions that can be taken to mitigate those foreseeable and already existing issues, post treatment management options to then maintain healthy forests, and utilizing fire as a management tool. Funding will be used to inventory the current conditions on individual landowners' properties, to implement on-the-ground restoration work, and to educate the landowners and community members. All restoration actions will address the existing detrimental state that our forests are currently in, reduce the threat of future large scale catastrophic fires and disease and insect infestations, and increase the knowledge of our local communities so we all can continue the work together to return our forests to an ecologically stable and healthy environment.

6. **Budget Overview:**

<b>Funding Period</b>	<b>OWEB Funding Request</b>	<b>Estimated Match</b>
Biennium 1	\$515,750	\$193,350
Biennium 2	\$897,650	\$297,600
Biennium 3	\$924,750	\$1,323,300
<b>Total</b>	<b>\$2,338,150</b>	<b>\$1,814,250</b>

**7. Overall Initiative Rating: Low (+)**

(see attached evaluation criteria review worksheet for details)

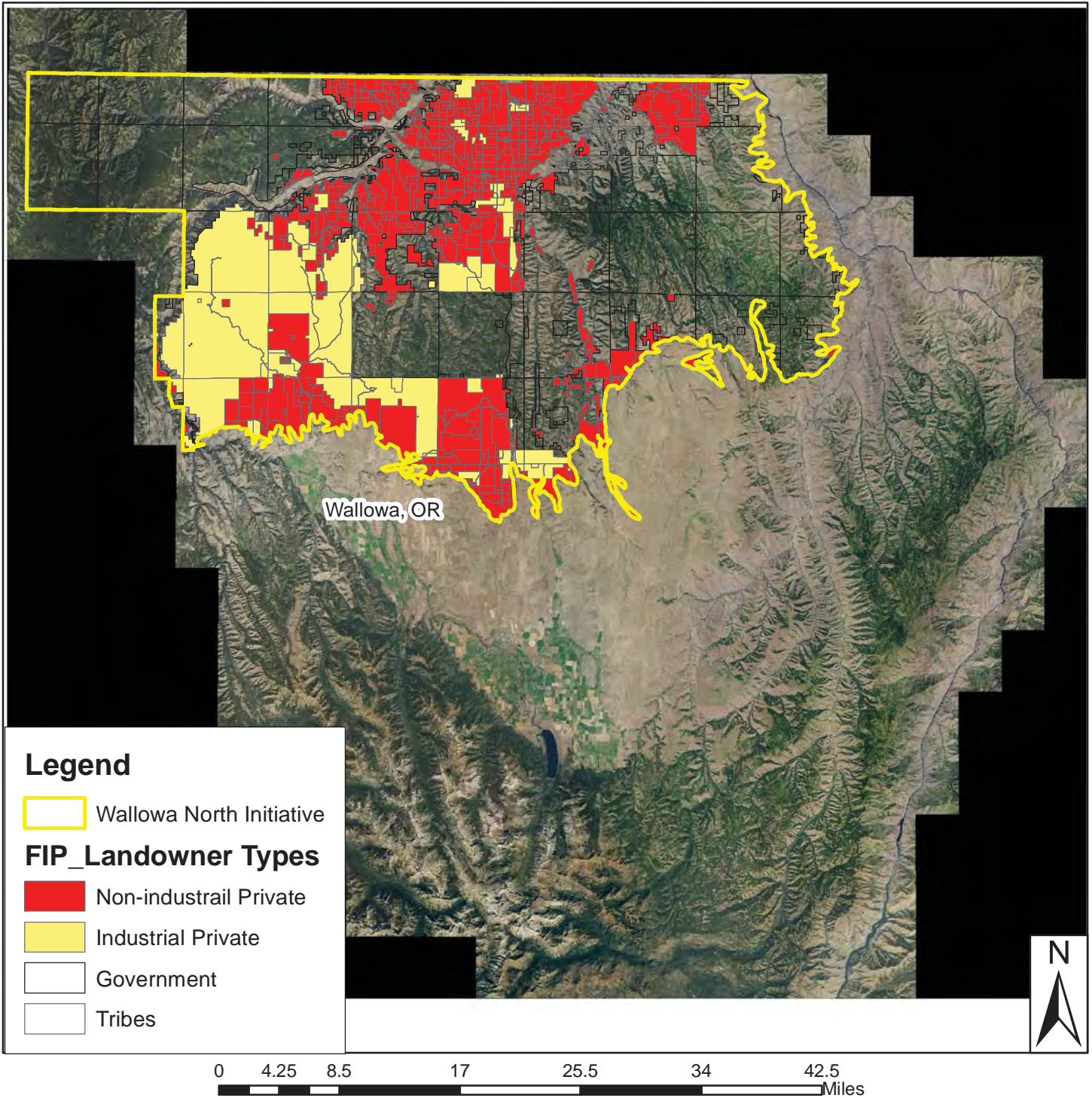
<b>Evaluation Criteria</b>	<b>Rating</b>
A) Extent to which initiative addresses a board priority	Medium (-)
B) Capacity to partner, engage the community, and catalyze additional investments	Low (+)
C) Performance history and composition of the partnership	Low
D) Potential for progress toward measureable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

**8. Board Subcommittee Discussion Summary:**

- There is concern over the extent to which the initiative effectively addresses the ‘Dry-Type Forest Habitat’ priority and resulting ecological outcomes. The initiative does not include a strong wildlife habitat conservation component.
- The partnership is strong, but is lacking key entities that could enhance their skillset, including the U.S. Forest Service, which is engaged in forest restoration efforts within the proposed geography and tribes that have a keen interest in this part of the state.
- Prescription fire may provide the most ecological benefit in this landscape, yet considerable forest thinning of trees with low commercial value needs to occur before prescribed burning is realistic at a large scale.
- The requested funding is low for a FIP initiative, but the partnership appears effective at implementing projects efficiently.
- ‘Good Neighbor Authority’ projects on federal land may be an option to consider for the partnership.
- The partnership appears ripe for submitting a landscape-scale restoration project through OWEB’s Open Solicitation grant program.

**9. Board Subcommittee Ranking: 9 (tie) of 10.****Attachment A: Initiative Map****Attachment B: Evaluation Criteria Ratings Worksheet**

# Wallowa North Forest Health Initiative



**FIP Priority Review:** Dry-type Forest Habitat

**Name of Initiative:** Wallowa North Forest Health Initiative

**Name of Partnership:** Wallowa Forest Health Partnership

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## EVALUATION CRITERIA

### (a) The extent to which the initiative addresses a Board-identified priority

*Rating: Medium (-)*

#### STRENGTHS:

- The partnership is implementing forest restoration work in the area, and is knowledgeable about what actions are necessary for the forest.
- The partners are skilled at engaging landowners and the broader community.

#### CONCERNS:

- The proposal lacks details in background information and how the initiative is tied to the foundational scientific literature.
- The rationale for forest restoration in this area, and not in other locations, is not well described in the proposal.

#### ADDITIONAL COMMENTS:

None

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

*Rating: Low (+)*

#### STRENGTHS:

- The partners have experience working in the community, and have clearly engaged landowners in forest restoration and other conservation efforts.
- The partnership has the ability to continue progress in landowner outreach through a variety of approaches.

**CONCERNS:**

- There are other entities engaged in forest restoration on adjacent projects (e.g., U.S. Forest Service) that are not included in the initiative. This is an important omission, as federal land is found throughout the project area.
- It is not clear where additional investments would come from, and it appeared that the leveraged funding would only be sought if a FIP were secured.
- The partnership did not attach any formal governance documents.
- The partnership budget for capacity building across the biennia appears to be low. It is important for partnerships to maintain capacity when implementing complex, landscape restoration work.

**ADDITIONAL COMMENTS:**

The partnership should consider applying for funding through OWEB's Open Solicitation program to support individual projects, particularly if it can be tied to a strategic approach to restoration in their area.

**(c) The performance history and composition of the partnership**

*Rating: Low*

**STRENGTHS:**

Partners have been working together, at least informally, for many years. The partnership's approach appears to work well in the community.

**CONCERNS:**

- The decision-making process for the partnership appears informal and lacks detail.
- The partnership appears to be loosely organized, and not ready for a multiple-year investment.
- The partnership may be missing key entities, for example the U.S. Forest Service. Concerns noted in (b) above apply here as well (e.g., missing partners and loosely organized partnership).

**ADDITIONAL COMMENTS:**

None

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

Rating: Low (+)

**STRENGTHS:**

- The partnership has a good track record of successfully engaging landowners and implementing projects.
- The proposal offers promise that the partners are headed in the right direction, as the actions that are proposed are what are needed in the initiative's geography.

**CONCERNS:**

- Improving fish and wildlife habitat is mentioned as a goal in the initiative, but it is not clear how the goal links to the actions listed.
- It is not clear if project prioritization has occurred, or if the partnership is looking for willing landowners.
- The proposal does not describe agreements with existing landowners, and it may be difficult to recruit adjacent landowners willing to allow prescribed fire at a landscape scale.
- The partnership referenced a previous project (Wallowa Front), but did not describe the outcomes of the project, lessons learned, nor how the partners have utilized adaptive management in response to those lessons.
- While working with private landowners is important, the initiative should include federal land in order to achieve landscape scale restoration.

**ADDITIONAL COMMENTS:**

None

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

Rating: Low (+)

**STRENGTHS:**

The partnership is making efforts to track the necessary metrics.

**CONCERNS:**

- The proposal is lacking quantifiable figures that would demonstrate the ecological trajectory of the initiative. The monitoring proposed is a minimal approach towards tracking outcomes.
- The hypotheses included in the proposal are vague; there appears to be ample room for further thought and development.
- The proposal lacks details related to tracking increased wildlife habitat and prescribed burn results.

**ADDITIONAL COMMENTS:**

None

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

Rating: Low

**STRENGTHS:**

The proposal indicates that the partners are heading in the right direction in utilizing scientific and planning tools. The Oregon Conservation Strategy is a relevant document to reference.

**CONCERNS:**

- The literature cited in the proposal is lacking in the latest science related to thinning and use of prescribed fire in Eastern Oregon.
- Relevant planning tools are not expressed well in the proposal.

**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 ratio of restoration grants to other grant types appears to be correct.

**CONCERNS:**

The monitoring request is low, particularly if baseline conditions need to be established.

**ADDITIONAL COMMENTS:**

None



1. **Name of Initiative:** Warner Basin Fish Passage and Habitat Improvement Initiative
2. **Name of Partnership:** Warner Basin Aquatic Habitat Partnership
3. **Application Number:** 220-8215-16490
4. **Initiative addresses the following Board-identified Priority(ies):** Aquatic Habitat for Native Fish Species

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

The Warner Basin Aquatic Habitat Partnership (WBAHP) is comprised of six organizations including the Lake County Umbrella Watershed Council, Lakeview SWCD, Oregon Department of Fish and Wildlife, U.S. Fish and Wildlife Service, U.S. Bureau of Land Management, and the U.S. Forest Service.

The WBAHP is focused on improving fish passage and habitat for Warner sucker and Warner Lakes redband trout, the two focal fish species inhabiting the Warner Basin tributaries included in the Warner Basin Fish Passage and Habitat Improvement Initiative (Initiative). The WBAHP has identified fish passage and habitat concerns, and has developed productive relationships with landowners and irrigation districts in the basin. Implementation funding will be used for project engineering, permitting, and construction of fish passage, screening, and habitat improvement projects.

The Initiative will invest in restoration projects in the Warner Lakes, identified by OWEB as a highest priority basin of the Focused Invest Priority for Inland Aquatic Habitat for Native Fish Species. The Initiative will achieve USFWS (1998) recovery criteria for Warner sucker by restoring fish passage and habitat among the three focal tributaries in the basin.

Reconnecting individual populations will restore a self-sustaining metapopulation among the three tributaries and the Warner Lakes.

6. **Budget Overview:**

<b>Funding Period</b>	<b>OWEB Funding Request</b>	<b>Estimated Match</b>
Biennium 1	\$2,000,000	\$597,500
Biennium 2	\$2,006,000	\$520,750
Biennium 3	\$1,857,000	\$497,000
<b>Total</b>	<b>\$5,863,000</b>	<b>\$1,615,250</b>

**7. Overall Initiative Rating: Medium**

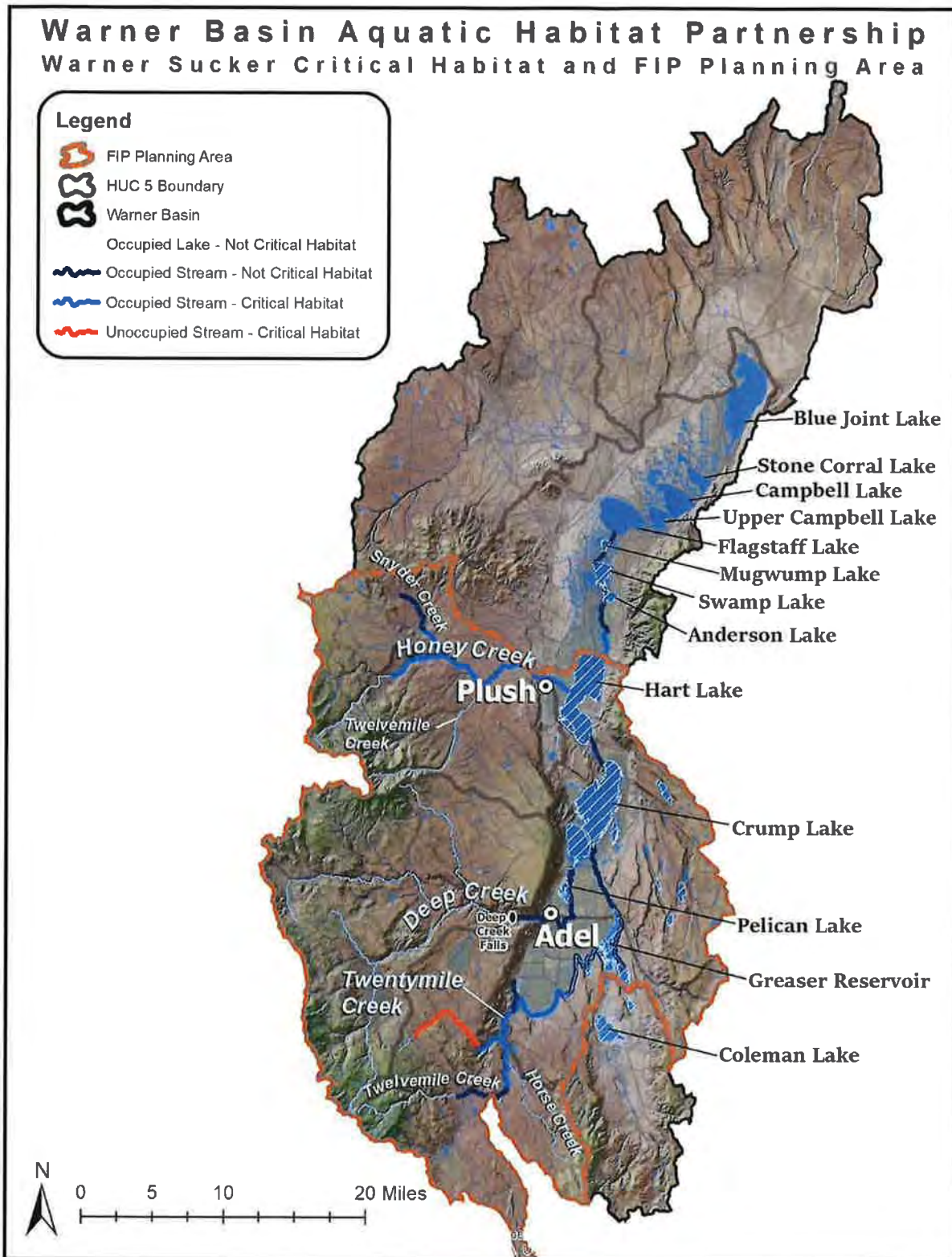
(see attached evaluation criteria review worksheet for details)

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

**8. Board Subcommittee Discussion Summary:**

- The partners have been working together closely and effectively for many years. The partnership created an MOU to formalize its structure and decision-making process since their proposal was submitted in June 2018.
- Habitat connectivity is identified as the primary limiting factor to delisting in the Warner sucker recovery plan. The initiative focuses on fish passage and screening and would address all remaining diversion barriers in the Warner sucker habitat range.
- The partnership's strategic action plan includes an approach to addressing water efficiency in the future, targeting 2025 for ramping up related restoration actions. Habitat connectivity is a necessary first step before the partnership can address water savings. Restoration treatments at diversion structures are designed to equip that infrastructure for water efficiency improvements in the future.
- The partners have landowner commitments in place at each diversion structure and projects are ready for implementation given the required funding.
- Fish passage will provide connectivity to some stream reaches with high quality habitat; other stream reaches will benefit from future habitat restoration. Fish passage will provide connectivity to Warner Lakes, which are important habitat for the Warner sucker.
- The partnership has done outreach to the tribal interests in the basin and there is a standing invitation for tribal engagement.
- The partnership's leveraged funding has tripled since their proposal was developed.
- Delisting of the Warner sucker is attainable and within reach. Delisting would be a significant accomplishment for the state of Oregon.

**9. Board Subcommittee Ranking: 3 of 10.**



**Figure 1.** The Warner Basin and the FIP Initiative planning area. Warner sucker designated critical habitat, the focal tributaries, and the Warner Lakes are also highlighted.

**FIP Priority Review:** Aquatic Habitat for Native Fish Species

**Name of Initiative:** Warner Basin Fish Passage and Habitat Improvement Initiative

**Name of Partnership:** Warner Basin Aquatic Habitat Partnership

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## EVALUATION CRITERIA

### (a) The extent to which the initiative addresses a Board-identified priority

*Rating: High (-)*

#### STRENGTHS:

- The Warner Basin sucker is within reach of delisting. It would be a major accomplishment for the state if this species is able to be delisted.
- The application does a nice job of tying the initiative to the limiting factors and restoration actions in the recovery plan, such as fish passage and invasive species.
- Fish passage is also critical for Warner Basin redband trout.

#### CONCERNS:

None.

#### ADDITIONAL COMMENTS:

The current USFWS recovery plan criteria do not include water quantity/availability. If in the future those criteria are updated to include consideration of water quantity/availability then the partnership should consider incorporating that information into its strategic planning.

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

*Rating: High (-)*

#### STRENGTHS:

- The partnership is firmly engaged in the community and has done extensive outreach and built working relationships with landowners in the area.
- Despite having strong landowner and community engagement, the partnership is using a consultant to help further develop their outreach efforts and strengthen relationships.
- The partnership has strong experience and understanding working with the irrigation districts in the area.
- The partnership is taking an approach to adaptive management that incorporates input from landowners to assess how projects are performing and impacting landowners.
- The application does not over-inflate match needs and the partnership is being realistic about funding needs.
- The application presents a pragmatic approach to conducting this work in a rural area.

**CONCERNS:**

There is minimal leverage funding, with a relatively high proportion of what is available as in-kind contributions from the partners.

**ADDITIONAL COMMENTS:**

None.

**(c) The performance history and composition of the partnership**

*Rating: Medium (-)*

**STRENGTHS:**

- The partnership includes a closely knit group of the right partners for successful implementation.
- The partners have a strong working history of successfully engaging the community, planning for and implementing projects throughout the geography.

**CONCERNS:**

- The partnership has a heavy reliance on specific individuals as partners. Turnover could be an issue for the partnership in losing institutional knowledge and working relationships.
- The application does not mention the involvement or role of any tribes in the work being proposed.
- The partnership does not have a formal decision making process, but has demonstrated a successful and effective process for many years. There is some concern that resolving any future issues could be challenging in the absence of formal governance documents, and the development of formal governance documents (e.g. MOU) could greatly benefit the partnership. However, a small partnership with a strong and extensive working history in this region may be able to overcome future issues without such formal documents.

**ADDITIONAL COMMENTS:**

Though formality is missing from this partnership, the structure and operating norms are appropriate for this rural community.

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

*Rating: Medium*

**STRENGTHS:**

- The initiative is focused in both restoration strategies and geography.
- Habitat connectivity is a key limiting factor to recovery, and fish passage is the primary restoration strategy in the initiative. Without fish passage, other restoration actions in the basin provide far less value.

- The partners will modify the operation of fish screens to meet the needs of landowners/irrigators who are also partners in the projects. The suite of proposed makes sense for treating diversions.
- The partners have developed strong relationships with landowners through longstanding and extensive outreach efforts. This makes collaborating with landowners on restoration actions and monitoring projects feasible to implement.

**CONCERNS:**

- The focus on fish passage is important as connectivity is the primary limiting factor, but fish passage may not be enough to accomplish the partnership's restoration goals.
- The invasive species management plan is an important component for recovery; however, the description of plan development and content is lacking in details in the application.
- Although the recovery plan does not address water quantity, this is a known limiting factor to recovery. Water quantity is lightly mentioned in the application, but the application does not provide any indication of how it might be addressed either in this initiative or in the future. The application does not address potential threats to expanding habitat for invasive species by enhancing connectivity through fish passage improvements.
- The application briefly mentions enhancements to riparian and land use practices, but does not discuss any restoration efforts for these purposes in detail. It's unclear what actions relating to riparian and land use practices might be included and how they have been strategized by the partnership.

**ADDITIONAL COMMENTS:**

There are popular sport fishing species present in the system, including crappie.

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

*Rating: Medium (-)*

**STRENGTHS:**

- The proposed project level monitoring is sound.
- Partnerships have been key to monitoring work in the basin, and ODFW has been a key partner in monitoring in the basin to date and moving forward.

**CONCERNS:**

- While project level monitoring is clear, the initiative's programmatic monitoring is unclear. The application does not describe how project level monitoring will be translated into progress and adaptive management at the initiative level. It is unclear how the partnership will track the collective efforts of individual projects toward delisting criteria of the Warner sucker.

- Discussions of adaptive management in the application are focused on project design and not the restoration strategy at the programmatic level.
- Monitoring in the basin could incorporate other parameters, such as streamflow and fish habitat.
- The application does not describe how many miles of habitat would be opened as a result of the fish passage projects.

**ADDITIONAL COMMENTS:**

Water use should be gaged in conjunction with screening efforts. The local watermaster may be interested in working with the partnership in this regard.

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

*Rating: Medium (-)*

**STRENGTHS:**

- The application features focused restoration goals.
- The partnership is considering conservation actions over a 25 year timeframe.
- The partnership is treating all diversions in the initiative geography. This will increase resiliency throughout the basin.

**CONCERNS:**

The Work Plan is basic and lacking detail, including what type of fish passage approaches will be selected for various project sites. The application does not articulate engineering, permitting, and restoration needs.

**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 budget is appropriate for what the partnership is planning to do in the initiative.
- The budget does not require much funding allocated to Stakeholder Engagement because the partners already have strong landowner relationships in place.

**CONCERNS:**

The monitoring budget allocations appear high compared to limited details in the application.

**ADDITIONAL COMMENTS:**

Water acquisition funding would benefit the goals of the initiative.

## 2018 FIP Subcommittee Ranking &amp; Funding Recommendations

Preliminary Subcommittee Score	Final Ranking	Proposed Initiative	OWEB Board-identified FIP Priority	Expert Review Rating	Requested 2019-2021 FIP Funding	Cumulative Funding Recommendation
5	1	<b>John Day Basin Native Fish Habitat Initiative</b>	Aquatic Habitat for Native Fish Species	High (-)	\$4,000,000	\$4,000,000
8	2	<b>Baker Comprehensive Sage-grouse Threat Reduction</b>	Sagebrush/Sage-steppe Habitat	High (-)	\$1,714,565	\$5,714,565
21	3	<b>Warner Basin Fish Passage and Habitat Improvement Initiative</b>	Aquatic Habitat for Native Fish Species	Medium	\$2,000,000	\$7,714,565
16	4	<b>Rogue Forest Restoration Initiative</b>	Dry-type Forest Habitat, Oak Woodland and Prairie Habitat	High (-)	\$1,500,000	\$9,214,565
19	5	<b>Clackamas Partnership Restoration for Native Fish Recovery</b>	Aquatic Habitat for Native Fish Species	Medium (+)	\$3,454,580	\$12,669,145
20	6	<b>Siuslaw River and Coastal Lakes Basin Habitat Restoration for Oregon Coast Coho Recovery</b>	Coho Habitat and Populations Along the Coast	Medium (+)	\$4,000,000	\$16,669,145
23	7	<b>North Santiam Aquatic Habitat Restoration</b>	Aquatic Habitat for Native Fish Species	Medium	\$2,526,068	\$19,195,213
32	8	<b>Central Coast Estuary Conservation &amp; Restoration</b>	Coastal Estuaries	Medium (-)	\$2,406,700	\$21,601,913
38	9	<b>Rogue Basin Partnership Little Butte Creek Watershed Initiative</b>	Coho Habitat and Populations Along the Coast	Low (+)	\$1,428,403	\$23,030,316
38	9	<b>Wallowa North Forest Health Initiative</b>	Dry-type Forest Habitat	Low (+)	\$515,750	\$23,546,066

\*Initiatives in gray are recommended for funding by the OWEB Board FIP Subcommittee







# Oregon

Kate Brown, Governor

## Oregon Watershed Enhancement Board

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*Agenda Item O-2 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 O-2 – Implementation FIPs Kick-Off Funding  
January 15-16, 2019 Board Meeting

### I. Introduction

This staff report provides an overview of the Implementation Focused Investment Partnership (FIP) pre-board award activities that will occur between January and July 2019, and requests funds to be delegated to the Executive Director for future awards.

### II. Background

At the January 2019 board meeting the board will select the 2019-2021 Implementation FIPs; however, the board will not award funding to those FIPs until July 2019. This six month period between selection and funding was built into the award cycle based on lessons learned from the initial round of Implementation FIP awards in 2015-2017. This period will allow the partners to work with OWEB staff to prepare for the launch of the initiative in July 2019, after the board award.

### III. Partnership Capacity

Staff experience working with the current Implementation and Development FIPs, and lessons learned from the Partnership Learning Project, have demonstrated the importance of covering the costs of partnership coordination and facilitation. FIP grantees are using OWEB grant funds to support partnership participation in planning and coordination activities as well as facilitation, when needed. These costs are ongoing throughout the lifecycle of a partnership, and are critical to the long-term success of the initiative.

With these lessons learned in mind, OWEB staff propose to provide small grants (not to exceed \$12,000) to each of the newly selected Implementation FIPs to cover specific activities which are necessary to occur prior to Implementation FIP funding being awarded in January 2019 and the launch of the initiatives in July 2019. The activities include:

1. Participation in a Kick-Off Meeting in the spring of 2019. The purpose of this meeting is to bring all partnerships together to discuss the FIP program, answer questions, and begin the development of the partnership agreement. Some pre-implementation funding will pay for partnership travel, per diem, and time to participate in this meeting.

2. Work with Bonneville Environmental Foundation (BEF) to review the partnership's strategic action plan and initiative work plan and translate that information into a results chain model, and develop a theory of change concept for the initiative.
3. Work with OWEB staff to develop partnership agreements and work on the details of the project-level application review process. The importance of developing this process early and clearly defining the roles and responsibilities of all parties was one lesson learned from the initial Implementation FIPs. Funds will pay for partners to meet and work with OWEB staff to develop the details of the process.

#### **IV. Recommendation**

Staff requests that the board delegate to the Executive Director the authority to enter into agreements with an award date of January 16, 2019, with selected 2019-2021 Implementation FIPs to cover OWEB-required activities that commence prior to July 2019, in an amount not to exceed \$48,000, to be taken from the Development FIP line item in the spending plan.



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*Agenda Item P supports OWEB's Strategic Plan priorities 3, 4, 5, 6, and 7 (see strategic plan for verbiage).*



## MEMORANDUM

**TO:** Oregon Watershed Enhancement Board  
**FROM:** Meta Loftsgaarden, Executive Director  
**SUBJECT:** Agenda Item P – Spending Plan  
January 15-16, 2019 Board Meeting

### I. Introduction

This report updates the board on the timeline for approval of the 2019-2021 spending plan, and requests the board provide general direction in terms of major spending plan category percentages. Staff also request feedback to determine if there is interest in new spending plan line items, or questions about current line items, to be addressed at the April board meeting.

### II. Second Item

After the Oregon Legislature approves OWEB's budget at the beginning of each biennium, the board considers and approves a spending plan for the distribution of grant funding. The OWEB 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 the federal Pacific Coastal Salmon Recovery Fund (PCSRF). The Oregon Legislature routinely allocates PCSRF funding based on estimated federal grant awards over two years.

At its July 2017 meeting, the board adopted a 2017-2019 Spending Plan totaling \$96.7 million. In June 2018, the board revised the spending plan to include additional recapture and PCSRF funding (Attachment A), for a total spending plan of \$108.9 million.

### III. 2019-21 Spending Plan Timeline

The 2019-21 Spending Plan will be approved by the board in July 2019. In preparation for that approval, the following steps will occur:

- In January 2019, the board will provide an indication of the percentages it would like to include for the overall spending plan budget categories.
- Between the January and April meetings, staff, in consultation with subcommittees as needed, will discuss funding options for specific grant types within each category.
- In April 2019, staff will present each of the line items within each category and propose an investment amount for each line based on the overall percentages

indicated by the board in January. The board will provide feedback on the funding amounts for each grant type.

- In July 2019, staff will present 2019-21 spending plan recommendations for board approval.
- In July 2020, the board will consider additional funds for the spending plan from PCSRF and recapture, similar to the approval at the 2018 July board meeting.

#### **IV. Spending Plan Percentages**

Attachment B to the staff report provides an initial recommendation of percentages for board consideration to allocate funds between the Open Solicitation, Focused Investments, Operating Capacity and Other categories.

As referenced in the Executive Director's Update: Budget and Legislative (agenda Item E-3), the revenue forecast for General and Lottery funds was updated in November. Based on the forecast, it is estimated that the 2019-21 spending plan will be \$106.8 million in the first year, with an additional \$6.9 million available in year two based on successful receipt of PCSRF funding. Percentages are provided based on those numbers, which will be updated again in May, prior to the board's final funding decision in July.

At the board's October, 2018 meeting, members discussed funding amounts for the Focused Investment Partnership program implementation initiatives. This information will be discussed during the 2019-2021 Implementation Focused Investment Partnership Selections (agenda Item O-1), prior to the spending plan discussion. Based on this discussion staff will provide updated percentages for the board.

#### **V. Spending Plan Categories**

Attachment A contains the current spending plan for the board to review in considering whether new line items are warranted or to highlight questions for staff response at the April board meeting. Attachment C provides a brief description of each spending plate category.

#### **VI. Recommendation**

Because actual budget figures will change based on future Lottery revenue forecasts, staff will not be requesting official approval of spending plan category percentages at the January meeting. Staff is requesting feedback on any recommendations for new spending plan line items or line items the board would like to receive additional information about at the April board meeting.

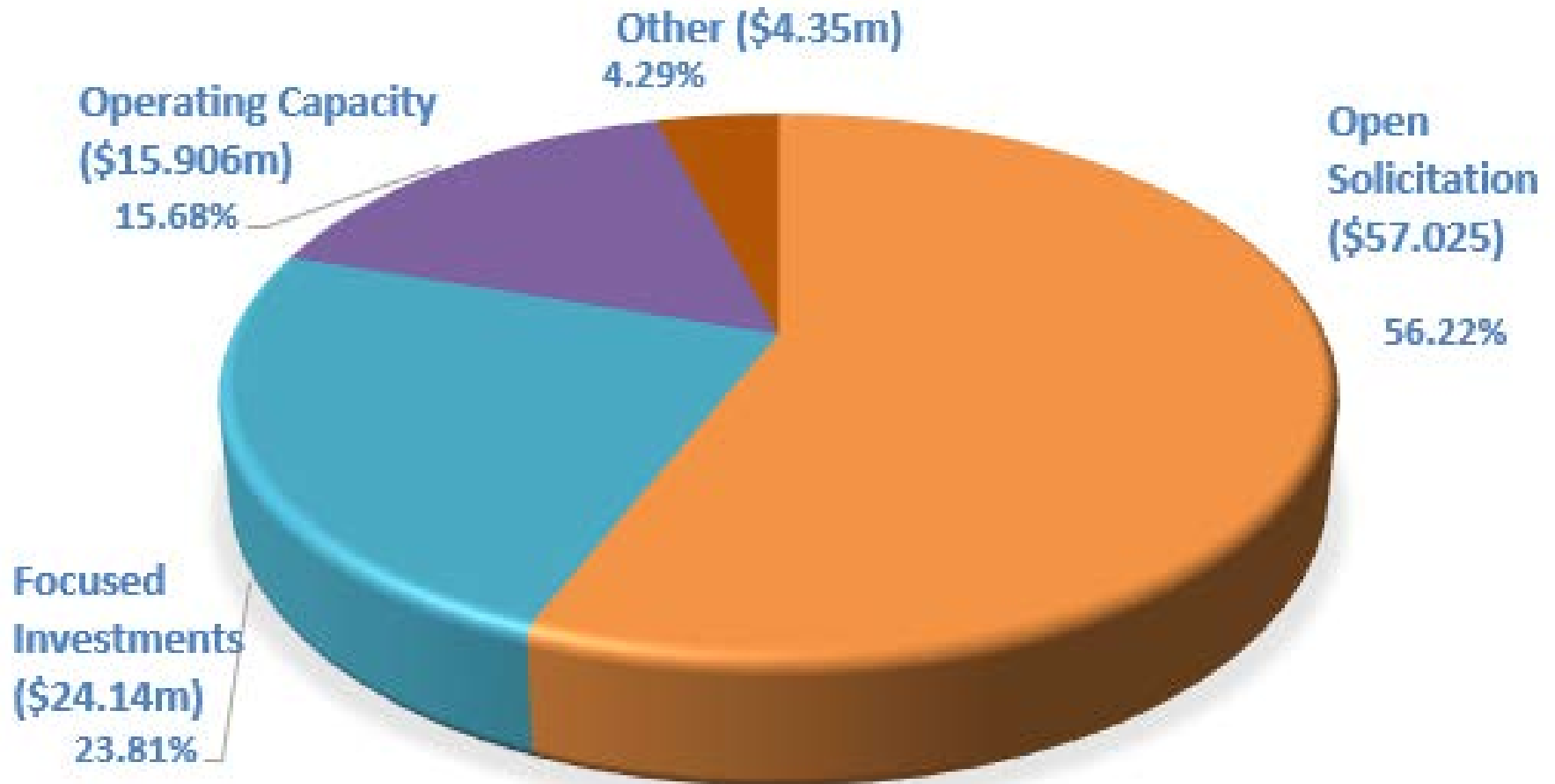
#### **Attachments**

- A. Spending Plan
- B. Proposed Percentages for 2019-21 Spending Plan
- C. Spending Plan Category Summaries

## OWEB 2017-19 Spending Plan for the January Board Meeting

	OWEB SPENDING PLAN	Jan 19 additions	Spending Plan as of Jan 2019	TOTAL Board Awards To-Date	Remaining Spending Plan after To-Date Awards	Jan 2019 Proposed Awards	Remaining Spending Plan after Jan 2019 awards
1	<b>Open Solicitation:</b>						
2	Restoration (includes USFW Coastal Wetlands)		33.000	25.032	7.968		7.968
3	Technical Assistance						
4	Restoration TA		4.000	2.636	1.364		1.364
5	CREP TA (includes NRCS & ODF funds)		1.435	1.435	0.000		0.000
6	Stakeholder Engagement		0.700	0.632	0.068		0.068
7	Monitoring grants		3.100	1.784	1.316		1.316
8	Land and Water Acquisition						
9	Acquisition (includes USFW Coastal Wetlands)		9.900	6.630	3.270		3.270
10	Acquisition Technical Assistance		0.600	0.150	0.450		0.450
11	Weed Grants		3.000	3.000	0.000		0.000
12	Small Grants		3.150	3.150	0.000		0.000
13	Programmatic Effectiveness Monitoring		1.587	0.556	1.031	0.200	0.831
14	<b>TOTAL</b>	<b>0.000</b>	<b>60.472</b>	<b>45.005</b>	<b>15.467</b>	<b>0.200</b>	<b>15.267</b>
15	<b>% of assumed Total Budget</b>		<b>62.43%</b>				
16	<b>Focused Investments:</b>						
17	Deschutes		4.000	4.000	0.000		0.000
18	Willamette Mainstem Anchor Habitat		2.445	2.445	0.000		0.000
19	Harney Basin Wetlands		1.970	1.970	0.000		0.000
20	Sage Grouse		2.355	2.355	0.000		0.000
21	Ashland Forest All-Lands		2.340	2.340	0.000		0.000
22	Upper Grande Ronde		2.417	2.417	0.000		0.000
23	Development FIPs		1.150	0.572	0.578	0.344	0.234
24	Fl Effectiveness Monitoring		0.750	0.750	0.000		0.000
25	<b>TOTAL</b>	<b>0.000</b>	<b>17.427</b>	<b>16.849</b>	<b>0.578</b>	<b>0.344</b>	<b>0.234</b>
26	<b>% of assumed Total Budget</b>		<b>17.99%</b>				
27	<b>Operating Capacity:</b>						
28	Capacity grants (WC/SWCD) incl. NRCS+LCWC		14.598	14.598	0.000		0.000
29	Statewide org partnership support		0.500	0.500	0.000		0.000
30	Organizational Collaborative Grants		0.400	0.400	0.000		0.000
31	<b>TOTAL</b>	<b>0.000</b>	<b>15.498</b>	<b>15.498</b>	<b>0.000</b>	<b>0.000</b>	<b>0.000</b>
32	<b>% of assumed Total Budget</b>		<b>16.00%</b>				
33	<b>Other:</b>						
34	CREP		0.750	0.750	0.000		0.000
35	Governor's Priorities		1.011	1.011	0.000		0.000
36	Strategic Implementation Areas		1.200	1.200	0.000		0.000
37	Strategic Plan Implementation Grants		0.500	0.500	0.000		0.000
38	<b>TOTAL</b>	<b>0.000</b>	<b>3.461</b>	<b>3.461</b>	<b>0.000</b>	<b>0.000</b>	<b>0.000</b>
39	<b>% of assumed Total Budget</b>		<b>3.57%</b>				
40	<b>TOTAL OWEB Spending Plan</b>	<b>0.000</b>	<b>96.858</b>	<b>80.813</b>	<b>16.045</b>	<b>0.544</b>	<b>15.501</b>
41	<b>OTHER DISTRIBUTED FUNDS IN ADDITION TO SPENDING PLAN DISTRIBUTION</b>						
42	Oregon Department of Fish and Wildlife - PCSRF		10.450	10.450	0.000		0.000
43	Lower Columbia Estuary Partnership		0.309	0.309	0.000		0.000
44	Forest Health Collaboratives from ODF		0.500	0.500	0.000		0.000
45	PSMFC-IMW		0.729	0.729	0.000		0.000
46	PSMFC-Coho Habitat Tools		0.166	0.166	0.000		0.000
52	ODOT	0.250	0.250	0.000	0.250	0.250	0.000
47	<b>TOTAL</b>	<b>0.250</b>	<b>12.404</b>	<b>12.154</b>	<b>0.250</b>	<b>0.250</b>	<b>0.000</b>
48	<b>TOTAL Including OWEB Spending Plan and Other Distributed Funds</b>	<b>0.250</b>	<b>109.262</b>	<b>92.967</b>	<b>16.295</b>	<b>0.794</b>	<b>15.501</b>

## SPENDING PLAN PERCENTAGES - 4 FIPS



# Spending Plan Category Summaries

## **Open Solicitation - Restoration**

Restoration grants are OWEB's primary method of delivering support for watershed projects that restore watershed functions. Restoration grants are offered twice per year, spring and fall, through a competitive granting program. Restoration grants provide assistance to landowners to restore watershed health locally and have been part of OWEB's history since its beginning in 1987 as the Governor's Watershed Enhancement Board.

## **Open Solicitation – Technical Assistance**

Technical assistance grants are offered twice per year, spring and fall, through a competitive granting program. Technical assistance grants through the open solicitation process are capped at \$75,000 per grant. These grants play a key role in developing future restoration grant proposals and increase the capacity of OWEB's local partners to engage in project development, planning, design, coordination and permitting.

## **Conservation Reserve Enhancement Program Cost-Share Payments and Technical Assistance**

The Oregon Conservation Reserve Enhancement Program (CREP) is a cooperative venture between the State of Oregon and Farm Services Agency, with technical support from the Natural Resources Conservation Service and local partners including soil and water conservation districts, watershed councils, and resource conservation and development councils. The purpose of this long-standing program is to restore, maintain, and enhance streamside areas along agricultural lands to benefit fish, wildlife, and water quality. Landowners enrolled in CREP receive annual rental payments and state and federal cost-share incentives to install approved conservation measures such as planting trees and shrubs, and installing fencing and livestock watering facilities. OWEB also provides competitive, statewide CREP Technical Assistance (TA) grants every two years. These grants support costs associated with local CREP implementation including staffing, travel, training, outreach, and planning.

## **Open Solicitation – Stakeholder Engagement**

Stakeholder engagement funds are invested through local grantees to communicate and engage with landowners, organizations, and the community about the need for, feasibility, and benefits of a specific eligible restoration or acquisition project or program that leads to development of eligible projects within an identified geography. Eligible projects are focused on a specific project site or sites, or that support resource assessment and planning that results in identification of a specific project site or sites; and will lead to eligible restoration or acquisition projects within a specific timeframe. Projects whose primary purpose is education are not eligible.



### **Open Solicitation - Monitoring**

Open Solicitation Monitoring Grants are awarded once per year in the fall grant cycle. Grants can be used to assist local partnerships with: assessing watershed conditions to determine the quality of the existing environment; identifying causes for changes in trajectory (either up or down) in habitat, fish and wildlife populations and water quality; and developing plans to guide future monitoring efforts.

OWEB's monitoring grants assist the agency in meeting its responsibility to: 1) provide support for cooperative monitoring activities, 2) describe the results of restoration investments, and 3) report on progress of the Oregon Plan for Salmon and Watersheds.

### **Land and Water Acquisitions**

OWEB funds projects involving the acquisition of interests in land and water from willing sellers for the purpose of maintaining or restoring watersheds and habitat for native fish or wildlife. OWEB-funded interests in land and water may be held by a variety of entities including, but not limited to, local, state and federal agencies, tribes, and not-for-profit conservation organizations and land trust trusts. OWEB funds several types of land and water acquisitions: the purchase of property in fee simple, conservation easements, permanent water rights, and water leases.

### **Oregon Department of Agriculture, Oregon State Weed Board Grant Program**

The Oregon Department of Agriculture (ODA) noxious weed control grants are awarded annually through the Oregon State Weed Board (OSWB). Grant projects protect watershed health, native fish, and wildlife habitat from the negative impacts of State Listed noxious weeds. The OSWB works to fund as many high-priority projects as possible with the available funds. Grants are restricted to projects that restore, enhance or protect fish and wildlife habitat, watershed functions, native salmonid populations, or water quality. Grants are for on-the-ground noxious weed control work. They must address State Listed noxious weeds and can include assessment, survey, outreach, and project design activities that are necessary to enable the weed control portion of the project. ODA and OWEB partner to support implementation of high-priority noxious weed control statewide. Noxious weed control is a first step in restoring watershed health and key to protecting the investment in Oregon's restoration work.

### **Small Grant Program**

OWEB Small Grant Program funds are awarded biennially to cooperative partnerships of watershed councils, soil and water conservation districts, and tribes. Twenty-eight teams form to prioritize and implement smaller-scale watershed restoration projects. Teams must select from an OWEB rule-defined list when identifying priority watershed concerns for their Small Grant Area. Priority concerns include fish passage; urban impact reduction; water quality and quantity/irrigation efficiency; road impact reduction; and instream, riparian, wetland, and upland process and function.

Small grants cannot exceed \$15,000, and are often the first grant a landowner may implement, leading to future restoration investments through the open solicitation grant program.

### **Open Solicitation Programmatic Effectiveness Monitoring**

Programmatic Effectiveness Monitoring (EM) includes OWEB-led initiatives that evaluate specific types of restoration actions at a larger geographic and temporal scale, rather than at the project scale. These initiatives consist of evaluating the effectiveness of OWEB-funded watershed restoration and enhancement projects and programs. Staff work with the board Monitoring Subcommittee to explore options for creating a well-rounded effectiveness monitoring program.

### **Focused Investment Partnership – Implementation**

Focused Investment Partnership (FIP) – Implementation investments address a board-identified priority of significance to the state; achieve clear and measurable ecological outcomes; use integrated, results-orientated approaches as identified through a strategic action plan; and are implemented by high-performing partnerships. The board selected 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

### **Focused Investment Partnership-Development**

Focused Investment Partnership (FIP) Development grants support existing partnerships in three areas: building their capacity to partner at a high-performing level, generating a new strategic action plan, and/or enhancing an existing plan within an OWEB Focused Investment Priority. Activities can also include community engagement and outreach related specifically to these efforts. Funds cannot be used to conduct new research, monitoring, or assessments. Existing partnerships are ones that include the necessary and sufficient partners to ultimately implement the partnership's strategic action plan. Receipt of capacity funding does not guarantee future Focused Investment Implementation funding from OWEB.

### **Focused Investment Effectiveness Monitoring**

Focused Investment Effectiveness Monitoring (EM) involves evaluating the dedication of funding to specific actions in a particular geographic area. The approach employed by Focused Investment Partnerships (FIPs) provides an opportunity to learn about the progress and outcomes possible under six-year investments. Information emerging from these investments will be used by the board and stakeholders to adaptively manage partnership investments in the future. In January 2016, the board awarded its first Implementation FIP grants. These investments are intended to support restoration at a strategic scale and resilient, sustainable partnerships that strategically plan and implement effective restoration projects.

## **Council Capacity**

Council Capacity grants are awarded biennially and help support the operations of effective watershed councils that engage people in their communities to participate in collaborative, voluntary restoration of watersheds. OWEB has provided operating grants to watershed councils for more than 15 years. Watershed councils are locally based, voluntary, and under ORS 541.890(15), “designated by a local government group convened by a county governing body, to address the goal of sustaining natural resource and watershed protection, restoration and enhancement within a watershed.”

OWEB does not create or oversee watershed councils. OWEB has discretion to provide capacity grants to councils that represent a balance of interests in their watersheds and demonstrate the potential to protect and enhance the quality of their watersheds. Councils also are expected to assure a high level of citizen involvement in the development and implementation of watershed action programs (ORS 541.910).

## **Soil and Water Conservation District Capacity**

Soil and Water Conservation District (SWCD) Capacity grants provide funding for 45 SWCDs to work with landowners to conserve natural resources and lend support to the Oregon Department of Agriculture (ODA) Agricultural Water Quality Management Program. The funding is divided into two funds for each SWCD:

- 1) *Scope of Work* funds support working with landowners and partners to protect and conserve natural resources; specifically, providing technical assistance and community engagement for the restoration and protection of native fish and wildlife, watersheds, and water quality through implementation of Agricultural Water Quality Management Area Plans.
- 2) *District Operations Fund* supports the capacity of the SWCDs to comply with Oregon Revised Statute (ORS) requirements, conduct business, and provide assistance to landowners and partners.

SWCDs are political subdivisions of state government, but are not state agencies. SWCDs are considered municipal corporations. They are governed by specific enabling legislation under ORS 568. The members of SWCD Boards of Directors are elected officials, to serve on either a five or seven member board.

## **Conservation Partnership**

The Conservation Partnership (Partnership) includes The Network of Oregon Watershed Councils (NOWC), Oregon Association of Conservation Districts (OACD), Coalition of Oregon Land Trusts (COLT), and Oregon Conservation Education & Assistance Network (OCEAN). These separate groups collaborate and coordinate to deliver technical support, member services, program development, training, and outreach to their stakeholders. Since 2007, the board has approved grants and supported the efforts of these organizations, recognizing that they provide a vital link between OWEB’s programs and successful on-the-ground work. OWEB’s funding has supported various deliverables in past biennia, including conferences, trainings, one-on-one work with local organizations, and youth activities.

## **Organizational Collaboration**

Organizational Collaboration grants support new or expanded strategic collaborations in order to build resilient, sustainable, local partners that achieve ecological outcomes and engage local communities. Activities may include 1) changing the operational structure of the organization(s) which may result in sharing of staff and services with other councils, districts or organizations, or 2) merger/consolidations of councils, districts, or councils and districts. The applicants must demonstrate that the organizational restructuring options being considered will strengthen organizational impact and build resiliency and sustainability of the organization(s). This category also provides short-term funding post-merger to successfully consolidated organizations to facilitate the successful transition of the newly combined organizations.

### **Governor's Priorities**

The Governor's Priorities spending plan line item supports work within the sideboards of Ballot Measure 76 that furthers priority programs and initiatives related to restoration in Oregon. Typically, these investments address landscape-scale or emerging issues related to restoration needs of importance as identified by the Governor's Office. Grant investments are targeted and catalyze broad-scale, multi-organizational work.

Under Ballot Measure 76, OWEB's funding has flexibility to address a range of needs that ultimately lead to on-the-ground restoration work. This, combined with Oregon's approach to addressing broad-scale initiatives through multi-organizational partnerships, has resulted in the use of OWEB funding as a catalyst to support emerging or particularly complex natural resource challenges and opportunities.

### **Strategic Implementation Areas (SIA) program**

The Oregon Department of Agriculture (ODA), Agricultural Water Quality Management Program, is leading "Strategic Implementation" where select areas around the state will receive focused outreach and education to address priority water quality concerns. Water quality goals are achieved by voluntary cooperation among landowners and natural resource partners to address management concerns, and by ODA enforcing water quality regulations.

Funding is for SWCDs and WSCs to provide technical assistance to landowners for outreach and restoration project design activities within newly identified SIAs. Any restoration projects developed from SIAs as a result of OWEB's technical assistance funding may be submitted either through OWEB's other grant programs or in partnership with other agencies for implementation.

### **Strategic Plan Implementation**

In the 2018 strategic plan, a number of areas are ripe for partnership, either to gather more information, to develop and complete monitoring, or to begin to implement key plan elements. Oregon has many highly equipped organizations that are poised to assist in this effort. Funding is to work in partnership with other organizations to implement key measures within the strategic plan.



# Oregon

Kate Brown, Governor

## Oregon Watershed Enhancement Board

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*Agenda Item Q supports OWEB's Strategic Plan priority # 4: Watershed organizations have a diverse and stable funding portfolio.*



## MEMORANDUM

**TO:** Oregon Watershed Enhancement Board  
**FROM:** Eric Williams, Grant Program Manager  
**SUBJECT:** Agenda Item Q – ODOT Fish Passage  
January 15-16, 2019 Board Meeting

### I. Introduction

In October 2016 the board authorized the Executive Director to enter into an Interagency Master Funding Contribution Agreement (Agreement) with the Oregon Department of Transportation (ODOT) to provide grant-making services to watershed councils for habitat restoration projects up to \$250,000. All of the initial funding has been encumbered for eligible fish passage projects. This report requests that the board authorize the Executive Director to amend the Agreement by adding up to an additional \$250,000 in ODOT funds.

### II. Background

ODOT manages a \$4.2 million per year Fish Passage Program to improve fish habitat in streams impacted by state transportation infrastructure. This program is in addition to, and falls beyond the scope of, required mitigation programs. Under the program, ODOT can allocate resources internally, hire contractors, or work with partner agencies to implement projects. Occasionally, the most suitable entity to carry out a habitat improvement project is the local watershed council. Since ODOT does not have granting authority to provide funds to councils, it entered into an Agreement with OWEB to provide grant-making services on a case-by-case basis.

### III. Projects to Date

Under the agreement, ODOT and OWEB execute work order authorizations for specific projects. OWEB requests a grant application, completes technical review, and awards funds to the local watershed council. The following projects totaling \$250,000 have been allocated funding under the Agreement:

- a. **Highway 36 Cleveland Creek Culvert Fish Passage Design, Siuslaw Watershed Council, \$11,633:** This technical assistance grant enabled the Siuslaw Watershed Council to contract with an engineering firm to complete a Right of Way Retracement analysis for a bridge to replace an undersized and misaligned culvert delivering Cleveland Creek, a salmon-bearing stream under Highway 36 near Tide, Oregon. This right of way analysis helped determine the exact

boundary of ODOT's property in the bridge construction area which will assist in building this bridge in the future.

- b. **North Fork Johnson Creek Crossing Fish Passage Improvement Project, Johnson Creek Watershed Council, \$88,709:** This restoration project will retrofit a culvert on the North Fork of Johnson Creek at Highway 26 to eliminate a barrier and slow velocity, allowing fish to pass through the culvert on this salmon-bearing stream.
- c. **Cleveland Creek Bridge Replacement Advance Design, Siuslaw Watershed Council, \$142,143:** This technical assistance project will result in a 95% design for a 70-foot span bridge to replace the current culvert at Cleveland Creek. When constructed, the project will result in access to 1.5 miles of high quality spawning and rearing habitat and provide cold water refugia from the mainstem Siuslaw River.

ODOT has indicated that it expects to have more projects eligible for funding under the Agreement in 2019.

#### **IV. Recommendation**

Staff request that the board authorize the Executive Director to amend the Interagency Master Funding Contribution Agreement (#217-901) with Oregon Department of Transportation by increasing ODOT's contribution from \$250,000 to \$500,000, and delegate authority to the Executive Director to enter into appropriate agreements with grantees under the terms of the Agreement.

**APPROVED BY THE BOARD April 16, 2019**

## Oregon Watershed Enhancement Board (OWEB)

### January 15, 2019 Board Meeting

Surfsand Resort – Oceanview Ballroom  
148 W Gower Ave  
Cannon Beach, OR 97110

MINUTES: Some agenda items are discussed out of order.

(Audio time stamps reference recording at: <https://youtu.be/x8kFe2ea9rg>)

#### **OWEB BOARD**

##### **MEMBERS PRESENT**

Boyer, Barbara  
Brandt, Stephen  
Buckmaster, Bruce  
Labbe, Randy  
Lee, Jan  
Marshall, Gary  
McAlister, Liza Jane  
Neuhauser, Will  
Reeves, Meg  
Robison, Jason

##### **ABSENT**

Alvarado, Ron  
Furfey, Rosemary  
Henning, Alan  
Henson, Paul  
Hollen, Debbie  
Kile, Molly  
Stangl, Kathy

##### **VACANT**

Board of Forestry

#### **OWEB STAFF**

##### **PRESENT**

Appel, Lisa  
Barnes, Darika  
Davis, Renee  
Dutterer, Andrew  
Duzik, Katie  
Fetcho, Ken  
Greer, Sue  
Hartstein, Eric  
Loftsgaarden, Meta  
Shaff, Courtney  
Williams, Eric

##### **OTHERS PRESENT**

Arnold, Jed  
Ayres, Betsy  
Beamer, Kelley  
Bey, Marko  
Bierly, Ken  
Borgia, Darren  
Brock, Jim  
Burkhardt, Derek  
Chambers, Chris  
Charette, Amy  
Coordes, Regan  
Esquivel, Robert  
Farrell, Justin  
Gannon, Chris  
Graham, Becki  
Henderson, Bonnie  
Krass, Marci  
Larson, Taylor  
Lev, Esther  
Littell, Nancy  
Loop, Lois  
Luncy, Bob  
Jackson, Nathan  
Keith, John  
McCandless, Collin  
McGinnis, Cheryl  
Mendoza, Lydia  
Merscreau, John  
Miller, Kolleen  
Morford, Shawn  
Morinaga, Kayla  
Mundy, Sarah  
Ortiz, Lorraine  
Oveson, Jeff  
Pearson, James  
Polenz, Marla  
Propst, Carolyn  
Resland, Angie  
Runyon, John  
Schiffman, Ron  
Schmeirer, Ann  
Schuler, Marci  
Sedell, Ted  
Sibert-Wahimund, Jan  
Smith, Brenda  
Stanely, Brooke  
Steele, Jesse  
Stern, Mark  
Suter-Goold, Marty  
Swanson, Kaola  
Voelke, Katie  
Walz, Kristen  
Webster, Jim  
Winter, Herb  
Zwissler, Sarah

The meeting was called to order at 7:57 a.m. by Co-Chair Will Neuhauser.

**A. Board Member Comments (Audio = 0:00:20)**

Board members provided updates on issues and activities related to their respective geographic regions and/or from the state and federal natural resource agencies they represent.

**B. Review and Approval of June Meeting Minutes (Audio = 0:35:00)**

The minutes of the October 16-17, 2018 meeting in Gold Beach were presented to the board for approval.

Jason Robison moved the board approve the minutes from the October 16-17, 2018 meeting in Gold Beach. The motion was seconded by Will Neuhauser. The motion passed unanimously. (Audio = 0:35:20)

**C. Board Subcommittee Updates (Audio = 0:35:40)**

Subcommittee reports were presented to the board in written form.

**D. Strategic Plan Update (Audio = 0:36:50)**

Executive Director Meta Loftsgaarden provided general updates on OWEB's 2018 strategic plan progress, and more detailed updates on specific priority areas and how OWEB staff are tracking the progress of each priority and supporting strategies.

**E. Executive Director's Update (Audio = 0:47:25)**

**E-1: Focused Investment Partnership (FIP) Monitoring**

This report was provided to the board in written form.

**E-2: Salmon License Plates**

This report was provided to the board in written form.

**E-3: Budget and Legislative (Audio = 0:48:03)**

Deputy Director Renee Davis provided an overview of OWEB's budget-related activities in preparation for the 2019 Legislative Session, highlighting the differences in OWEB's Agency Request Budget and the Governor's Recommended Budget. Senior Policy Coordinator Eric Hartstein provided a broad overview of the upcoming legislative session, including relevant Natural Resources committee assignments, and briefly reviewed legislation that would provide technical corrections to OAHP statutes, if approved.

**F. Public Comment (Audio = 1:18:35)**

The Oregon Conservation Partnership came before the board to provide an update on their organizations' individual and collective activities. The Partnership was represented by Kelley Beamer from the Coalition of Oregon Land Trusts (COLT), Shawn Morford from the Network of Oregon Watershed Councils, and John Keith from the Oregon Association of Conservation Districts. They announced they received a grant from the Brainerd Foundation to support communication efforts. Beamer asked that the board watch a video on YouTube called "Wild Possibilities," which is one of a series of short films produced by COLT and the Land Trust Alliance with a grant from Meyer Memorial Trust.

**G. Water 4 Initiative**

Due to the Federal government furlough, this agenda item was cancelled.

**H. Programmatic Effectiveness Monitoring Funding Requests (Audio = 1:29:20)**

Deputy Director Renee Davis and Programmatic Effectiveness Monitoring Coordinator Ken Fetcho presented three funding requests to the board for 1) a pilot to track performance for



Conservation Reserve Enhancement Program (CREP) projects, 2) effectiveness monitoring support for the Middle Fork John Day River Intensively Monitored Watershed, and 3) to continue a grant offering that assists OWEB and its partners with communicating outcomes from restoration work.

Co-Chair Randy Labbe moved the board award up to \$25,000 from the Open Solicitation Programmatic Effectiveness Monitoring line item in the 2017-19 spending plan to support grants that develop and pilot a performance tracking approach for CREP, and delegate to the Executive Director the authority to distribute the funds through appropriate agreements with an award date of January 15, 2019. The motion was seconded by Gary Marshall. The motion passed unanimously. (Audio = 1:59:50)

Co-Chair Randy Labbe moved the board award up to \$75,000 from the Open Solicitation Programmatic Effectiveness Monitoring line item in the 2017-19 spending plan to support the effectiveness monitoring program associated with the Middle Fork John Day River Intensively Monitored Watershed, and delegate to the Executive Director the authority to distribute the funds through appropriate agreements with an award date of January 15, 2019. The motion was seconded by Gary Marshall. The motion passed unanimously. (Audio 2:00:35)

Co-Chair Randy Labbe moved the board award \$100,000 from the Open Solicitation Programmatic Effectiveness Monitoring line item in the 2017-19 spending plan to support grants for additional retrospective analyses to tell the restoration story, and delegate to the Executive Director the authority to distribute the funds through appropriate agreements with an award date of January 15, 2019. The motion was seconded by Gary Marshall. The motion passed unanimously. (Audio = 2:01:20)

## **I. Oregon Agricultural Heritage Program (OAHP) (Audio = 2:02:50)**

### **I-2: OAHP Commission Appointments (Audio = 2:04:00)**

Executive Director Meta Loftsgaarden and Grant Program Manager Eric Williams briefly reviewed the structure of OAHP appointments and recommended to the board that Mary Wahl and Ken Bailey be re-appointed to the Oregon Agricultural Heritage Commission, each for a four-year term.

Co-Chair Will Neuhauser moved the board reappoint Ken Bailey, as recommended by the Board of Agriculture, and Mary Wahl, as recommended by the Fish and Wildlife Commission, to the Oregon Agricultural Heritage Commission for four-year terms. The motion was seconded by Jason Robison. The motion passed unanimously. (Audio = 2:06:30)

### **I-1: OAHP Rules (Audio = 2:07:45)**

Grant Program Manager Eric Williams presented the Oregon Administrative Rules being proposed for adoption, which have been revised according to public comment and recommended by the Oregon Agricultural Heritage Commission. Commissioners Lois Loop and Nathan Jackson joined Williams before the board to provide information about the Commission and the development of the draft rules. Board members were given the opportunity to ask clarifying questions on each section of the rules.

**OAHP Rule Public Comment (Audio = 2:20:30):**

Kelley Beamer from the Coalition of Oregon Land Trusts came before the board to discuss the progress of a proposed legislative bill that would provide funding for the OAHP. She talked about different ways the bill will be promoted and supported, including legislative breakfasts, a Capitol Day, legislator visits, and more.

Meg Reeves moved the board adopt the administrative rules as revised in response to public comment and recommended by the Oregon Agricultural Heritage Commission as specified in Attachments A through E in the Oregon Agricultural Heritage Program Rules staff report with the additional revision that rules titled OAR 698-005-0100 and related waiver rules in each division be modified to say that “any waiver must be in writing and included in the grant file to which the waiver applies and reported to the Commission by the next meeting,” and the additional authority to correct any Scrivener’s errors that come to light as the rules are finalized. The motion was seconded by Jason Robison. The motion passed unanimously. (Audio = 3:10:30)

**J. 2019-2021 Development FIP Grant Awards (Audio = 3:13:10)**

Capacity Programs Coordinator Courtney Shaff presented three applications being recommended for Development FIP grant awards to support existing high-functioning partnerships that wish to write a strategic action plan, enhance an existing plan, and/or develop a financial plan.

**Public Comment (Audio = 3:18:20):**

Sarah Zwissler from Trout Unlimited came to support the Salmon Super Highway project (219-302-165740) and explained how the funds will be used by their partnership. Regional Program Representative Katie Duzik was called upon to discuss OWEB’s past interaction with the Salmon Super Highway Partnership.

Co-Chair Randy Labbe moved the board award Development FIP grants to the staff funding recommendations as described in Attachment B to the Development FIP Grant Awards staff report. The motion was seconded by Jason Robison. The motion passed unanimously. (Audio = 3:32:00)

**K. Implementation FIP Update (Audio = 3:33:20)**

Grant Program Manager Eric Williams was joined by Senior Policy Coordinator Eric Hartstein and Partnerships Coordinator Andrew Dutterer to provide a progress report on OWEB’s FIP Implementation program and introduce representatives from OWEB’s six FIP Implementation partnerships, each of whom provided detailed reports about their partnership progress and activities. Partnerships were represented before the board as follows:

1. Deschutes Partnership (\$4 million): Chris Gannon from the Crooked River Watershed Council; Kolleen Miller from the Upper Deschutes Watershed Council; Natasha Bellis from the Deschutes River Conservancy. (Audio = 3:42:00)
2. Willamette Mainstem Anchor Habitat Working Group (\$2.45 million): Taylor Larson from Coast Fork Willamette Watershed Council; Marci Krass from Willamette Riverkeepers; Collin McCandless from the Calapooia Watershed Council. (Audio = 4:07:15)
3. Upper Grande Ronde Restoration Partners (\$2.4 million): Jesse Steele and Kayla Morinaga from the Grande Ronde Model Watershed; Jim Webster from the Union Soil

and Water Conservation District; Ted Sedell from the Oregon Department of Fish and Wildlife. (Audio = 4:36:40)

4. Harney Basin Wetlands Initiative (\$1.97 million): Esther Lev from the Wetlands Conservancy; James Pearson from Oregon State University; Brenda Smith from the High Desert Partnership. (Audio = 5:00:15)
5. Oregon Model to Protect Sage Grouse, All Counties Partnership (\$2.355 million): Sarah Mundy and Marty Suter-Goold from Harney Soil and Water Conservation District, Derek Burkhardt from the Malheur Soil and Water Conservation District; Justin Ferrell from Lakeview Soil and Water Conservation District. (Audio = 5:30:30)
6. Ashland Forest All-lands Restoration Initiative (\$2.34 million): Marko Bey from Lomakatsi Restoration Project; Darren Borgias from The Nature Conservancy; Chris Chambers from the City of Ashland. (Audio = 5:50:25)

**L. Land Acquisition Conveyance (Audio = 6:27:40)**

Grant Program Manager Eric Williams explained to the board a potential conveyance to the U.S. Forest Service of the Keystone property, which was acquired by the Wild Rivers Land Trust (formerly Elk River Land Trust) with OWEB acquisition program funds. This transaction will require OWEB relinquish an easement to allow the transfer of ownership to a federal agency, and provisions for repayment of grant funds used for the initial purchase. Wild Rivers Land Trust is seeking a sense of direction from the board prior to expending significant resources on due diligence before initiating a formal request for the conveyance.

**Q. ODOT Fish Passage (Audio = 7:00:00)**

Grant Program Manager Eric Williams came before the board to request that the board authorize the Executive Director to amend the existing interagency agreement with the Oregon Department of Transportation (ODOT) for fish passage grants by increasing the amount received from ODOT from \$250,000 to \$500,000. The initial funding of \$250,000 has already been encumbered for eligible projects, and ODOT has three projects that are currently eligible, and expects several more in the near term.

Co-Chair Will Neuhauser moved the board authorize the Executive Director to amend the Interagency Master Funding Contribution Agreement (#217-901) with Oregon Department of Transportation by increasing ODOT's contribution from \$250,000 to \$500,000, and delegate authority to the Executive Director to enter into appropriate agreements with grantees under the terms of the Agreement. The motion was seconded by Bruce Buckmaster. The motion passed unanimously. (Audio = 7:09:05)

The meeting was adjourned at 4:46 p.m. by Co-Chair Randy Labbe.

# Oregon Watershed Enhancement Board (OWEB)

## January 16, 2019 Board Meeting

Surfsand Resort – Oceanview Ballroom  
148 W Gower Ave  
Cannon Beach, OR 97110

**MINUTES:** Some agenda items are discussed out of order.

(Audio time stamps reference recording at: <https://youtu.be/hCZnaiCPzIY>)

### **OWEB MEMBERS PRESENT**

Boyer, Barbara  
Buckmaster, Bruce  
Labbe, Randy  
Lee, Jan  
Marshall, Gary  
McAlister, Liza Jane  
Neuhauser, Will  
Reeves, Meg  
Robison, Jason

### **OWEB STAFF PRESENT**

Barnes, Darika  
Davis, Renee  
Dutterer, Andrew  
Duzik, Katie  
Greer, Sue  
Hartstein, Eric  
Loftsgaarden, Meta  
Shaff, Courtney  
Williams, Eric

### **OTHERS PRESENT**

Abercrombie, Troy  
Beamer, Kelley  
Berg, Tristen  
Blankenship, Michael  
Brick, Jim  
Burkhardt, Derek  
Butler, Tim  
Charette, Amy  
Coordes, Regan  
Gannon, Chris  
Keith, John  
McGinnis, Cheryl  
Morford, Shawn  
Neeley, Doug  
Salzer, Jan  
Salzer, Tom  
Shalom, Gail  
Vaughan, Bruan  
Walls, Kristen  
Winters, Herb  
Zwissler, Sarah

### **ABSENT**

Alvarado, Ron  
Brandt, Stephen  
Furfey, Rosemary  
Henning, Alan  
Henson, Paul  
Hollen, Debbie  
Kile, Molly  
Stangl, Kathy

### **VACANT**

Board of Forestry

The meeting was called to order by Co-Chair Randy Labbe at 8:00 a.m.

### **M. Public Comment (Audio =0:01:05)**

The board was addressed by Tim Butler and Tristen Berg from the Oregon Department of Agriculture and Troy Abercrombie from the Tillamook County Soil and Water Conservation District to thank the board for their support of OWEB funding for the Oregon State Weed Board grant program.

### **N. Implementation FIP 2017-2019 Action Items (Audio = 0:11:55)**

Senior Policy Coordinator Eric Hartstein and Partnerships Coordinator Andrew Dutterer presented to the board two requests related to Implementation FIPs. Hartstein requested the board carry-forward on 2015-2017 biennium funds for current Implementation FIP initiatives,

and explained how OWEB policy is being modified to reduce future requests. Dutterer explained a request by the Deschutes Partnership to adjust the scope of their FIP initiative to include stream habitat restoration in the Crooked River basin.

Co-Chair Randy Labbe moved the board carry-forward 2015-2017 biennium funding for each of the six current Implementation FIP partnerships to make any balances of funding available to the partnerships through the 2019-2021 biennium. The motion was seconded by Jason Robison. The motion passed unanimously. (Audio = 0:19:35)

Co-Chair Randy Labbe moved the board approve the scope of initiative change for the Deschutes Partnership to pursue instream and riparian habitat improvement projects in the Crooked River basin. The motion was seconded by Bruce Buckmaster. The motion passed unanimously. (Audio = 0:25:35)

**O. Implementation FIPs (Audio = 0:26:20)**

Grant Program Manager Eric Williams provided an overview of the 2019-2021 FIP solicitation, covering the application and expert technical review team processes, as well as the interview of partnerships, and recommendations made by the focused investments board subcommittee.

**O-1: 2019-21 Implementation FIP Selections (Audio = 0:16:15)**

**Public Comment (Audio: 0:16:20):**

Members from the Clackamas Partnership, represented by Cheryl McGinnis, Tom Salzer, Jim Brick, Doug Neeley, and Gail Shalom addressed the board to discuss the importance of the restoration work they are doing in their watershed, the match they are able to secure, and to request that, if additional funding becomes available, that the board will consider the Clackamas partnership for a 2019-21 Implementation FIP grant award.

Members from the John Day Partnership, represented by Amy Charrette, Kristin Walls, and Herb Winters thanked the board for their investment in the John Day Partnership through the FIP Development program and the recommended investment in the partnership as an Implementation FIP.

Co-Chair Randy Labbe moved the board alter the existing recommendation of the focused investment subcommittee to include the Clackamas Partnership among the list of FIPs recommended for funding in Attachment C to the 2019-2021 Implementation FIP Selections staff report. The motion was seconded by Jason Robison. The motion passed with seven favorable votes and two dissenting votes (McAlister and Marshall). (Audio = 1:47:45)

**O-2: Implementation FIPs Kickoff Funding (Audio 1:59:45)**

Capacity Programs Coordinator Courtney Shaff discussed with the board the activities of the five newly selected FIPs leading up to their funding in July 2019, recommending \$60,000 to cover required activities that commence prior to final approval of FIP implementation grants in July 2019.

Co-Chair Randy Labbe moved the board delegate to the Executive Director the authority to enter into agreements with an award date of January 16, 2019, with selected 2019-2021 Implementation FIPs to cover OWEB-required activities that commence prior to July 2019, in an amount not to exceed \$60,000, to be taken from the Development FIP line

item in the spending plan. The motion was seconded by Jan Lee. The motion passed unanimously. (Audio = 2:03:00)

**P. Spending Plan (Audio = 2:04:15)**

Executive Director Meta Loftsgaarden reviewed the process for the board to approve the spending plan each biennium and explained delegated authority. She also presented the timeline for approving the 2019-21 spending plan for the next biennium, including spending plan categories, and the percentages allocated to each major category.

The meeting was adjourned at 11:05 a.m. by Co-Chair Neuhauser. (Audio = 2:42:25)